



INSTITUTE FOR DEFENSE ANALYSES

The United States and Africa—Looking Toward the Next Decade: Symposium Report

George F. Ward
Elisabeth A. Ferland
Katherine E. Vinci
David Shinn
Yun Sun

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Executive Summary

Introduction

On June 7, 2016, a group of 175 Africa specialists convened at the National Press Club in Washington, DC, under the sponsorship of the Institute for Defense Analyses, the National Intelligence Manager for Africa at the Office of the Director of National Intelligence, and the National Intelligence University, to discuss the outlook for the relationship between the United States and the countries of Africa over the coming decade. Participants in this symposium came from a variety of communities interested in Africa—U.S. Government agencies and military commands, academia, think tanks, and non-governmental organizations. Several ambassadors and other diplomats from African embassies in Washington also participated.

The program consisted of:

- Introductory remarks by the Assistant Secretary of State for African Affairs, Ambassador Linda Thomas-Greenfield.
- Panel discussions on:
 - African megatrends.
 - Africa’s external partnerships.
 - Policy alternatives for the United States.
- A luncheon keynote address on the state of democracy in Africa by Dr. Jeffrey Herbst, President and CEO of The Newseum.
- A closing summary by a distinguished former U.S. diplomat with deep experience in Africa, Ambassador Johnnie Carson.

This report includes:

- A thematic summary that synthesizes the symposium.
- The symposium schedule.
- A detailed account of the proceedings.

Broad Analytical Consensus—Diverse Policy Prescriptions

In keeping with the symposium’s aim of looking forward over the next decade, speakers and participants focused on broad trends rather than near-term developments. The

speakers and panelists painted a picture of an African continent in the midst of great change, both internally and in terms of the roles that the countries of Africa are playing on the wider world stage. They agreed that the great changes sweeping the continent dictate adjustments in the U.S. approach to Africa.

There was a remarkable degree of consensus on the nature of the broad changes that are underway. The experts' policy prescriptions differed, but more in emphasis than in fundamental objectives. The following sections of this report discuss African megatrends, Africa's changing global relationships, and the implications of change for U.S. policy.

Consensus on African Megatrends

1. The most fundamental change occurring in Africa is **demographic**. Eight of the 10 countries worldwide with the highest birth rates are in Africa. There are now more children born daily in Nigeria than in all the countries of Western Europe combined. The continent's population is currently around 1.1 billion. Over the next 30 years, that population will more than double to around 2.3 billion. Rapid African population growth will contrast with population stagnation or even decline in other regions of the globe. The result will be a continent with the youngest and fastest growing labor force in the world. In terms of power trends, demographic change will fuel a definitive transfer in power from the Africa's independence and liberation generation to a successor.
2. The continent's rapid **urbanization** is perhaps the next most impactful change underway in Africa. The face of Africa is changing from rural to urban. By 2020, Africa will have 11 megacities with populations exceeding 5 million and 134 urban areas with populations ranging from 500,000 to 5 million. This sort of massive growth is putting enormous pressure on governments to improve urban infrastructures and to tackle the unemployment issue. One factor complicating efforts to deal with the challenges of urbanization is that the density of populations in African cities is lower than elsewhere in the world, requiring more expansive infrastructure networks.
3. **Climate change** may be the single greatest threat to the fragile degree of progress that has been achieved in Africa. Issues related to water resources are particularly pressing. Persistent drought in the Sahel region and elsewhere is driving population movements and thereby conflicts. The situation in Darfur is one example. Although Africa overall has abundant water resources and arable land, those resources are unevenly distributed and often isolated from population concentrations.
4. **Education** is in crisis all over Africa. While there has been significant progress in expanding primary education in Africa, the availability and quality of

secondary and tertiary education have lagged and in some respects declined. In essence, quantity has come at the cost of quality. Graduates of African universities often lack the skills needed for employment in the continent's modernizing economies. African universities that were once globally recognized centers of excellence are being overwhelmed by the sheer number of students and lack of resources. They are producing many underqualified graduates. As a result, unemployment, and thereby frustration, among recent secondary school and university graduates is growing even while jobs requiring technical skills go unfilled. The situation is even worse for the large population of disenfranchised youths who lack access to secondary and tertiary education. There is a particularly desperate need for improved vocational and technical training for that group.

5. African **economies** are maturing. Although raw materials remain by far Africa's most important export revenue sources, the most vibrant emerging economies on the continent are not resource rich. Instead, their growth is being fueled by the rise of a fast-growing class of consumers with sufficient disposable income to purchase goods such as processed foods, household items, cellphones and smartphones, and automobiles. While economies dependent on the export of single commodities, such as Angola, Nigeria, and Zambia, have suffered as resource prices have declined, other diversified, increasingly consumer-driven economies such as Kenya have continued to grow. Unfortunately, economic maturation does not seem yet to have reduced the **alarmingly high level of corruption** that exists in many African countries.
6. Progress has been slow and setbacks continue to occur, but **democracy has spread** and **conflicts are decreasing** in Africa. One speaker asserted, however, that **"peak freedom"** may have been reached in the first decade of this century, when Freedom House carried only 29 percent of African countries as "not free." Since then, there has been a decline in indicators of freedom in many countries of Africa. Leaders who were once regarded as champions of a new democratic order, such as Paul Kagame in Rwanda and Yoweri Museveni in Uganda, seem to have transformed themselves instead into new authoritarians. Other speakers were more optimistic, noting the decline in number of military coups and the increase in elections that live up to at least minimum standards of fairness.

Recognition of Africa's Changing Global Role

Based on their congruent understandings of the megatrends at work in Africa, the speakers and panelists at the symposium painted similar pictures of the evolving roles of African countries on sub-regional, regional, and global stages. Several of their observations

are particularly helpful in understanding the changing web of external relationships of African countries.

1. **Political clout and economic power** on the continent are becoming more diffuse. Traditional heavyweight countries such as Nigeria and South Africa have turned inward as they deal with domestic problems. At the same time, other centers of power have begun to emerge. In different ways and in various spheres, countries like Ethiopia, Kenya, Tanzania, and Uganda in East Africa; Botswana and Namibia in Southern Africa; and Côte d'Ivoire and Ghana in West Africa have begun to play larger roles. As the economic differentiation among African countries continues, some will speed ahead to become more integrated in global value chains, while others will be left behind. Regional Economic Commissions (RECs) such as the Economic Commission of West African States (ECOWAS) and the East African Union have become more than talk shops, and they are embarking on projects that promise to substantially improve economic integration.
2. Africa is beginning to **provide for its own security**. The African Union (AU) is focused on preventing conflicts and responding more effectively to conflicts when they do occur. The AU has improved its ability to sustain effective partnerships, both externally with the United Nations and internally with the RECs. It has organized and deployed peace operations forces in multiple instances. Nevertheless, there are significant gaps in the fabric of African security. The AU is heavily **dependent on foreign funding**. After more than a decade of effort, the AU and the RECs have **failed to create an operational African Standby Force** for rapid deployment in crisis situations.
3. **Private funding is eclipsing public aid**. Even though foreign donors have maintained and even increased their levels of development assistance for Africa, private fund flows are far greater. In addition to outside investment in Africa's resource sectors, there has been a surge in both direct and portfolio investment in the consumer and services sectors of Africa's emerging economies. Besides investment from overseas, investors in African countries such as South Africa and Kenya have become active on the continent. Beyond that, remittances from African workers overseas are increasingly important factors. The increased importance of private fund flows compared to development assistance is likely over time to reduce the policy leverage of donor governments.

Africa's Evolving Partnerships

A growing, increasingly diversified Africa has attracted **increased attention from both old and new external partners**. The engagement of China with Africa has attracted a great deal of attention, but China is only one of the relatively new external players. New

relationships with countries such as India, the Gulf States, Turkey, Singapore, Malaysia, Indonesia, Thailand, and Brazil (until recent economic and political setbacks caused it to step back) are challenging Africa's more traditional partners. Traditional partners, including Europe, North America, Japan, South Korea, and Australia, have not disengaged, but they need to adapt to a situation in which the number of players has increased.

China's relationship with Africa is complex. The relative economic slowdown in China caused Sino-Africa trade to drop 18 percent in value in 2015. Within that figure, Africa's exports to China, overwhelmingly raw materials, dropped 40 percent in value. Measured in terms of volume, however, China's imports in some categories actually increased. China's oil imports in 2015 increased 9 percent in volume, and its iron ore imports increased 2 percent in volume.

Looking toward the longer term, the **development strategies of China and Africa could mesh.** China is adjusting its domestic economic structure to focus on technology and capital investment. African countries need to expedite their industrialization and boost employment for their growing workforces. The comparative advantages of the two could be combined by China's transferring its declining, labor-intensive industries to Africa. Perhaps driven by its growing economic presence on the continent, China is also expanding its cultural presence and is demonstrating greater willingness to take positions on internal African issues, which it heretofore has considered out of bounds.

One hurdle to overcome with regard to **Chinese investment in Africa** is the question of collateral for loans. In the past, Chinese loan agreements were backed by African natural resources. With the decline in natural resource prices and, in some cases, demand, China may need to transition to a new model in which lending would be sustained through increasing African GDPs and tax revenues. Doubt remains about whether such a new model can be developed in time to meet African needs for infrastructure investment.

Discussion at the symposium also focused on **Africa's security partnerships.** Again, China is an increasingly important actor in this area. China is now the leading contributor of peacekeeping forces among the "Permanent Five" members of the UN Security Council (i.e., United States, United Kingdom, France, Russia, and China). China's naval operations around Africa have increased markedly. Between 1949 and 2008, Chinese naval vessels made three port calls in Africa. In the following seven years, there were 39 Chinese port calls. Most of the latter were in connection with the anti-piracy effort in the Gulf of Aden.

Despite the increased security activities of China and other newly relevant players, the consensus at the symposium was that the United States and the countries of Western Europe would remain **Africa's primary security partners** over the next decade. The United States and other major Western powers maintain dense webs of bilateral and multilateral security relationships on the continent. Western European financing is fundamental to the survival and future development of the African Union.

In summary, the increasing diversity among African countries is mirrored in a similar diversity among Africa's external partners. Each player has varying interests and approaches to foreign policy with Africa. The game is not about replacing old partners with new, but rather about doing business in increasingly crowded and competitive political, economic, and security spaces.

Policy Alternatives for the United States

In the final panel discussion of the symposium, speakers focused on opportunities and challenges in the relationship between the United States and Africa over the coming decade. Their remarks reflected a consensus that the U.S.-Africa relationship needs to move to a new level of maturity reflecting the growing diversity on the continent and the increased relevance of African voices on issues of global concern. There seemed to be consensus among the panelists that the relationships between the United States and the countries of Africa need to move:

- From bilateralism to multilateral cooperation.
- From development assistance to trade and investment.
- From training and equipping Africa's armed forces to building sustainable defense institutions.
- From poverty alleviation to strengthening the growing African middle class.

In their specific programmatic recommendations, panelists recommended that the United States should:

- Come to grips with the problem of insecurity fueled by the effects of climate change by working with the countries of the Sahel region to create a sustainable model for security and development in that subregion.
- Break with its tendency to leave African views on the back burner when issues of global concern are considered. Africa needs to be included in strategies for achieving consensus on global issues.
- Eliminate the differences among government agencies in their geographic definitions of Africa. Effective policymaking and implementation is difficult when some agencies exclude the countries of North Africa from their African affairs entities while others do not.
- Not neglect engagement with subnational entities, such as the federal states of Nigeria, that often have larger populations and more economic clout than many national governments. Likewise, greater engagement with the RECs will be needed if the United States is serious about fostering economic integration on the continent.

Fifteen Points to Remember

Ambassador (ret.) Johnnie Carson, former Assistant Secretary of State for African Affairs, closed the symposium with a synthetic statement of 15 “educated assumptions” about Africa’s future. Some of these reinforce and others challenge, the views expressed during the symposium.

1. The next decade will be an enormously challenging time for the expansion of democracy across Africa. Africa will become increasingly divided between states committed to democracy and those that have authoritarian regimes.
2. Africa’s economies have expanded rapidly over the past two decades, but many will struggle to grow at moderate rates over the next 10 years. Sustained long term growth will require African governments to undertake greater reforms.
3. The number of major African conflicts has declined significantly and progressively over the last four decades and will decline further over the next 10 years.
4. Terrorism/violent extremism on the continent will continue to increase. We will see instances of terrorism and in new places.
5. Africa’s population growth will not slow down over the next one or two decades. Africa will continue to have the youngest and fastest growing population in the world.
6. Population growth will accelerate the continent’s already rapid urbanization. Most African nations have not dealt effectively with urbanization. They are unlikely to do so when faced with lean economic times.
7. Mobile technology will not be the silver bullet required for generating significant new employment or the enormous economic growth that Africa’s burgeoning population will require.
8. Climate change will have a devastating impact on Africa over the next several decades. Africa will be more severely affected than any other continent and the least capable of dealing with the consequences.
9. Africa’s once abundant wildlife will continue to decline, and some species will face near extinction. This is largely due to poaching, but population growth, urbanization, deforestation, and poor land management also contribute.
10. Narcotrafficking and domestic drug use will present increasing challenges to African governments. West Africa is often seen as most affected, but this is a problem in East and South Africa as well.

11. Africa will remain unable to feed itself. The continuing food deficit will be due to climatic shocks, rising populations, and the slow introduction of green farming technologies.
12. The quality of African education will continue to lag despite the provision of near-universal primary school and the expansion of both public and private universities.
13. Africa is strengthening its sub-regional institutions. The East African Community made serious strides forward. Progress toward economic integration will remain mixed due to political tensions and leaders' ambitions.
14. The state-to-state model of relationships may be outdated, and the United States should find ways to work effectively with subnational entities.
15. Corruption will remain a problem over the next decade and will decrease only if good governance and democracy take stronger root. Building stronger institutions is critical.

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Symposium Proceedings

A. Opening Remarks—Assistant Secretary Linda Thomas-Greenfield

After brief welcoming remarks by Dr. David Chu, President and CEO of the Institute for Defense Analyses, and Mr. Terrance Ford, National Intelligence Manager for Africa, Office of the Director of National Intelligence, Ambassador Linda Thomas-Greenfield, Assistant Secretary of State for African Affairs, outlined the accomplishments of the Obama administration with regard to Africa, discussed priorities for the coming months, and looked ahead toward the next decade in U.S.-Africa relations.

1. Good News/Success Stories

There have been some extraordinary successes in fulfilling the mission statement of the Bureau of African Affairs, which is “*partnering to promote and ensure democracy, peace, and prosperity.*” At the top of the list is Nigeria’s democratic presidential election. A free and fair election is what the people of Nigeria were determined to attain, and the candidates respected that. There were lots of behind-the-scene efforts on the part of the United States and its partners. The candidates honored their commitments to peace and nonviolence; the election was peaceful, transparent, and led to transfer of power from ruling party to the opposition.

The Central African Republic election in February is another example. Not long ago, the country was considered a humanitarian disaster in the making due to its civil war. There was concern that the CAR might be the scene of the next genocide. Two years later, it was able to have free and fair elections. There is still a lot of work to be done, but the country took a big step forward.

In Burkina Faso, the people stood up to the ruling party to demand change. When the military took over, the people refused to go along. They achieved a transitional government that delivered a free and fair election. The U.S. Government took pride in backing and supporting the people of Burkina Faso.

One of the legacies of the Obama Administration is the Presidents’ Young African Leaders Initiative; these fellows are Africa’s future. There are 1,000 youth members in the program this year, and their energy and ambitions are impressive. They use technology to erase borders and share ideas. This will have lasting power. The United States provides the platform, but they will carry it forward in the future.

The first U.S.-Africa Leaders Summit was a significant success. African leaders are still expressing their appreciation and asking that the next administration hold additional summits.

The African Growth and Opportunity Act (AGOA) was also reauthorized. This was huge for Africa, and exports have increased. They know they can benefit more from it. Achieving passage of AGOA required heavy lifting by the State Department and the African diplomatic corps. Trade ministers from Africa also lobbied on the Hill.

The U.S. response to Ebola was also a success story. The United States led the way in stopping the outbreak, at a cost of more than \$1.2 billion.

President Obama's trip to Kenya and Ethiopia gave him the opportunity to be the first U.S. President to speak at the African Union (AU). The visit is still paying dividends.

2. 2016 Priorities

This is the "Year of Completion," with the objective of ensuring that Africa remains on the agenda for the next Administration. President Obama has said, "I believe Africa's rise is not just important for Africa, but for the entire world." Africa's 1 billion people are not a challenge, but a resource. Africa's youth must become an integral force for the continent's success. For that to happen, the creation of democratic institutions is necessary, and that remains the highest priority focus for the U.S. Government in 2016 and beyond. There are 17 elections in Africa this year, and the U.S. Government is working to ensure that they will be free, fair, and transparent. It is not about a specific candidate winning. The candidate of the United States is democracy. Success lies in the process.

Security is another U.S. Government priority for Africa. This requires strong partnerships, relationships, and coordination. There is still work to do to expand the campaign against al-Shabaab and support the Somali government in elections and in establishing the Somali National Army. The Ugandans want to pull out of AMISOM because they have been in Somalia for nine years and do not see an end in sight. The U.S. Government needs to define the end state and work with AMISOM to ensure that there is a defined path toward the end-state. The U.S. Government also needs to work on a strategy to fight Boko Haram in Nigeria and weaken the group's capacity, finances, and cohesion. The problem in northeast Nigeria cannot be solved on battlefield; the conditions that foster extremism need to be improved.

In South Sudan, the U.S. Government has worked to end the devastating war. Formation of a transitional government in April 2016 was a key step forward. Now this success needs to be solidified. This is a top priority for this Administration and should be also for the next Administration.

In Burundi, President Pierre Nkurunziza's decision to seek a third term has led to violence. Thousands have died or taken refuge in neighboring countries. Finding a solution

to violence is critical, and neighboring countries need to put pressure on the Burundian government to do the right thing.

Africa can and must create jobs for its growing population. The U.S. Government will be sponsoring a business forum in New York City in September. Jobs need to be created by the private sector. Governments can provide the enabling environment for the private sector to thrive. We are encouraging governments to attract foreign direct investment (FDI). China's opportunities are immense—if Africans can negotiate a good investment deal with China, then they should do that. American companies have been skittish in investing in Africa, and we want to make them aware of rich investment opportunities there.

Building healthcare infrastructure in Africa is another U.S. Government priority. The United States is committed to help prevent the spread of infectious diseases.

In summary, the United States has an ambitious agenda for Africa over the next seven months. There is reason for optimism about Africa's future. Working on Africa is a "team sport." It is not just a government mission, but a mission for all those committed to Africa.

3. General Discussion

In discussing how to balance strategic interests with encouraging democracy and how to incentivize leaders to promote democracy, Assistant Secretary Thomas-Greenfield stressed that the strategic interest of the United States is to promote democracy. Because many leaders do not believe in the core values of democracy, they need to be incentivized, encouraged, and held accountable (e.g., consequences for exceeding term limits in Burundi).

With respect to the 2014 African Leaders Summit, the Assistant Secretary said that although there was a sense that the summit had been successful and should be repeated, there was no agreement on periodic summits. A second successful summit meeting might lead to institutionalization of the concept, and she was confident that a new Administration would organize a second meeting.

Commenting on China's growing military role on the continent, Assistant Secretary Thomas-Greenfield noted that the Chinese are moving fast but also moving carefully. They are conscious of their legacy of expensive "white elephant" projects, and they are engaging more closely with the United States to learn lessons. It was notable that in the last iteration of U.S.-China consultations on Africa, the Chinese side had not repeated its previous mantra on noninterference in internal African questions. They have been very engaged with the U.S. envoy on South Sudan. Chinese interests are in often competition with those of the United States in Africa, but there are opportunities for cooperation. The United States should not stand in the way of Chinese engagement in Africa but should work to ensure that Chinese companies behave more responsibly.

B. Panel Discussion on “A Continent Evolving: African Megatrends”

1. **Moderator:** Ms. Amanda Dory, Deputy Assistant Secretary of Defense for African Affairs.
2. **Presenter:** Dr. Steven Radelet, Donald McHenry Chair in Global Human Development, Georgetown University.
3. **Respondents:** Mr. Judd Devermont (National Intelligence Officer for Africa), Mr. Howard French (Associate Professor, Columbia University School of Journalism), and Dr. Amadou Sy (Director, Africa Growth Initiative, Brookings).

1. Presentations

a. Dr. Steven Radelet

Dr. Radelet opened by saying that focusing on megatrends is both fun and dangerous as there are so many. He would certainly not be able to cover every trend or dive deeply into any. He focused on six megatrends.

1) Diversity and Divergence in Experience and Performance

It does not make sense anymore to try to take all African countries and fit them into one perspective. Countries need to be considered individually or in smaller groups. There are really big differences between the emerging countries that are performing well economically—and moving toward democracy for the most part—and those that have made very little progress economically or democratically.

Figure 1 shows that the emerging countries have seen their average incomes double over the last 20 years. Oil-exporting countries also performed pretty well. Threshold countries are doing fairly well, but not great. Stagnating countries’ average income has not changed in 20 years (Figure 2 shows GDP growth projections for these same groups of countries; see Table 1 for a list of each, by category.)

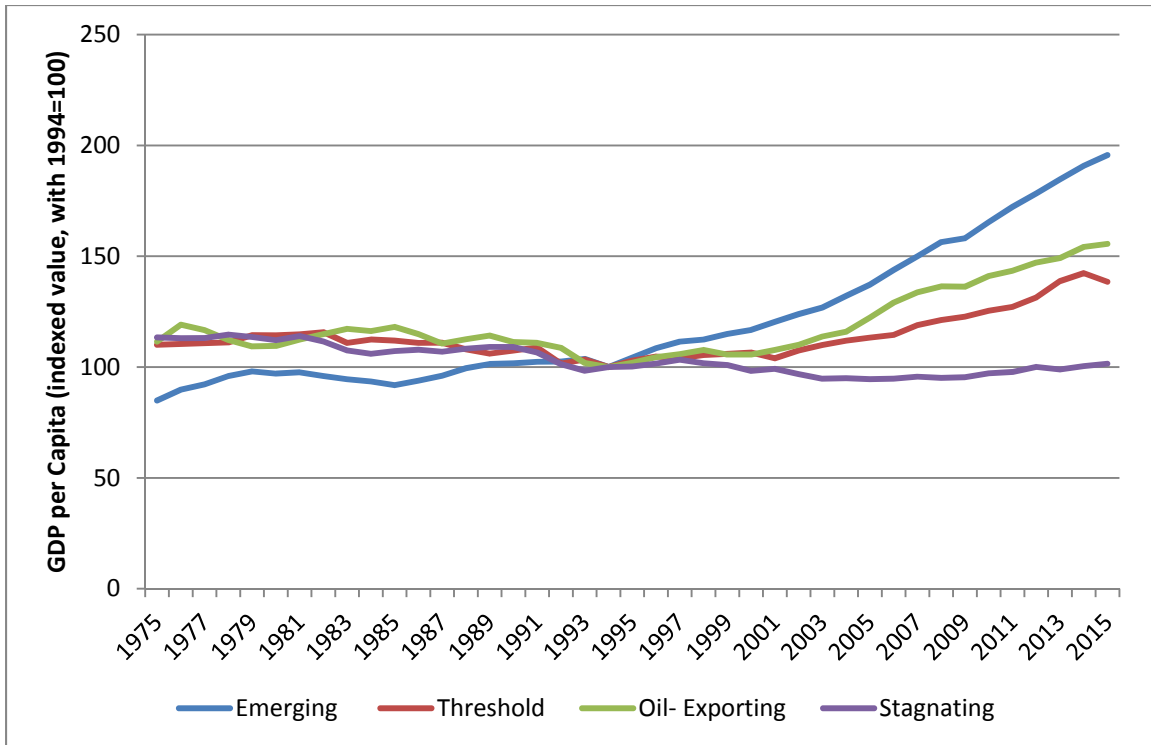
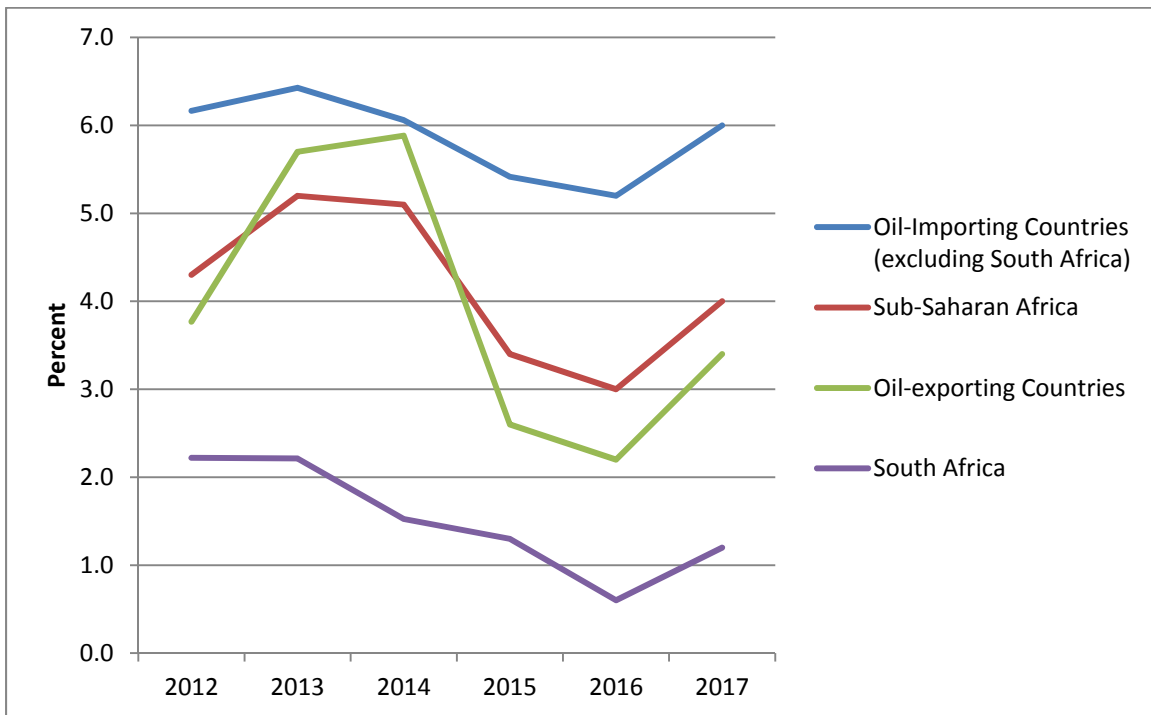


Figure 1. GDP Per Capita Index, Four Groups of SSA Countries



Source: IMF, Regional Economic Outlook Sub-Saharan Africa, April 2016.

Figure 2. GDP Growth Projections

Table 1. African Countries by Category

Emerging Countries	Stagnating Countries	Oil Exporters
Botswana	Burundi	Angola
Burkina Faso	Central African Republic	Cameroon
Cape Verde	Comoros	Chad
Ethiopia	Congo, Dem. Rep.	Congo, Rep.
Ghana	Côte d'Ivoire	Eq. Guinea
Lesotho	Djibouti	Gabon
Mali	Eritrea	Mauritania
Mauritius	Gambia, The	Nigeria
Mozambique	Guinea	Sudan
Namibia	Guinea-Bissau	
Rwanda	Niger	
Sao Tome and Principe	Madagascar	
Seychelles	Somalia	
South Africa	Swaziland	
Tanzania	Togo	
Uganda	Zimbabwe	
Zambia		

Threshold Countries

Benin
Kenya
Liberia
Malawi
Senegal
Sierra Leone

2) Surge in Progress

There has been unprecedented progress in the last 20 years in about half the countries in Africa. The poverty headcount (Figure 3) index is falling faster in Africa than anywhere in history. This is due to economic growth getting to some of the very poorest people. However, many of these poorest people are still definitely being left out.

Figure 4 shows that the child mortality rate dropped very quickly. This is due to improvements in health and healthcare despite the HIV/AIDS epidemic, malaria crisis, and Ebola outbreak. Overall, the trend is unquestionably toward improvements in health on the continent.

Education rates are up and more girls are in school than ever before. This is a foundational trend that is going to set up the next generation for even more growth and success.

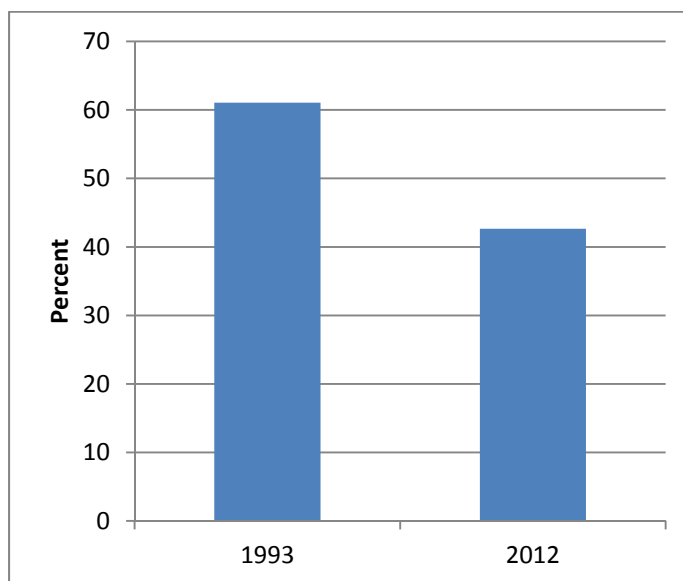
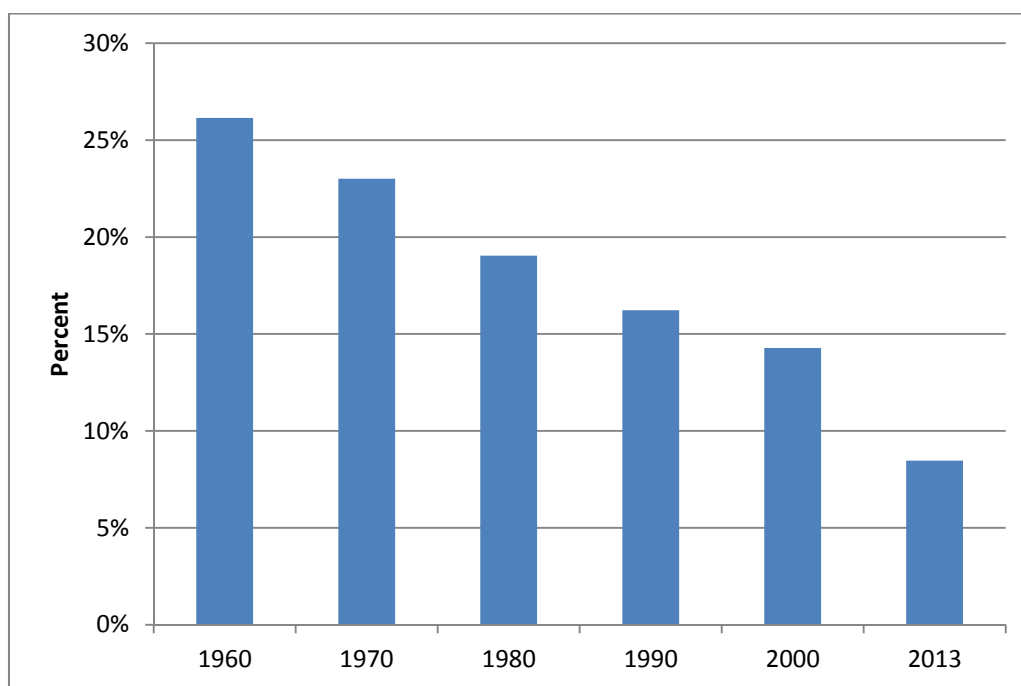


Figure 3. Poverty Headcount Index, SSA. Share of People Living under \$1.90/day (constant 2011 prices).



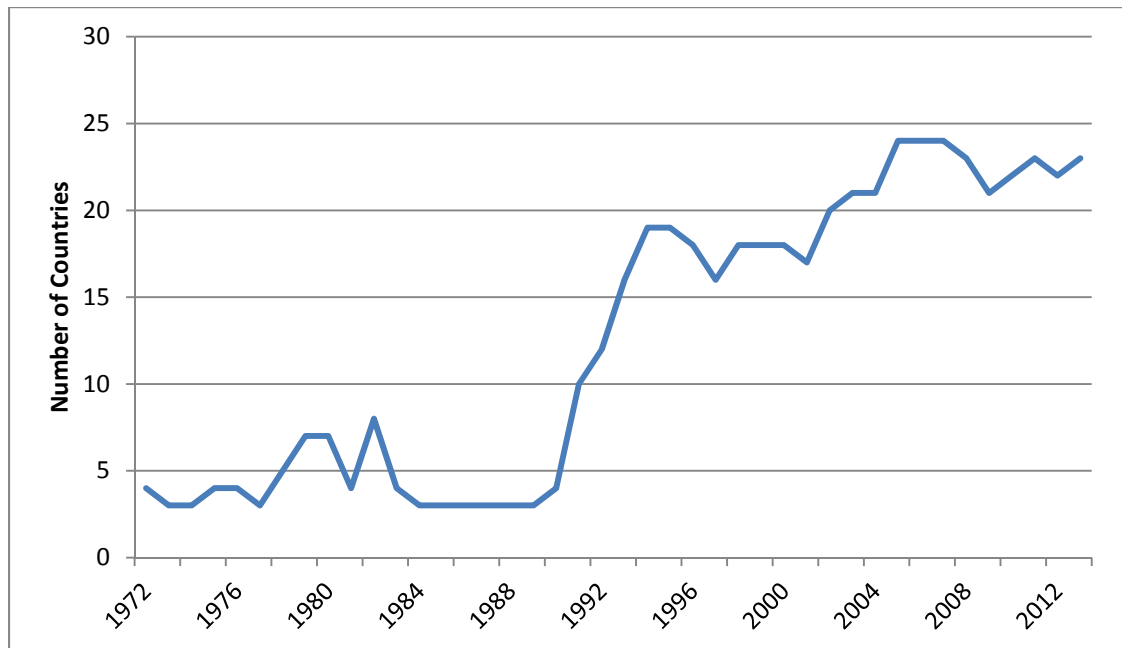
Source: World bank, World Development Indicators.

Figure 4. Child Mortality Rate, SSA. Share of children that die before their fifth birthday.

3) Governance—Shift Toward Democracy

This trend toward democracy accelerated in the 1990s and surged again in the early 2000s (Figure 5). In the last few years it has stagnated or even fallen back to a certain

extent. Democracy in Africa is fragile and imperfect; elections do not always work very well; and governments can still be too cozy with business. However, there should be no expectation of “perfect democracy” in Africa. It is unrealistic to expect that in a few decades countries can transition from centuries of colonial rule to perfect democracies. We need to mix pressure and hopes for change with the recognition that democracy is hard.



Source: Radelet, Emerging Africa.

Figure 5. Number of Sub-Saharan African Democracies

With the shift toward democracy in some countries, we have seen fairly impressive improvements in governance (Figure 6). This is just another example of the divergence of experience across the continent. While there is a lot of conflict on the continent, there is much less now than there has been in the past (Figure 7). Civil liberties and freedom of the press have fundamentally improved in about half the countries in Africa. Those improvements matter far more than commodity prices in determining long-term progress.

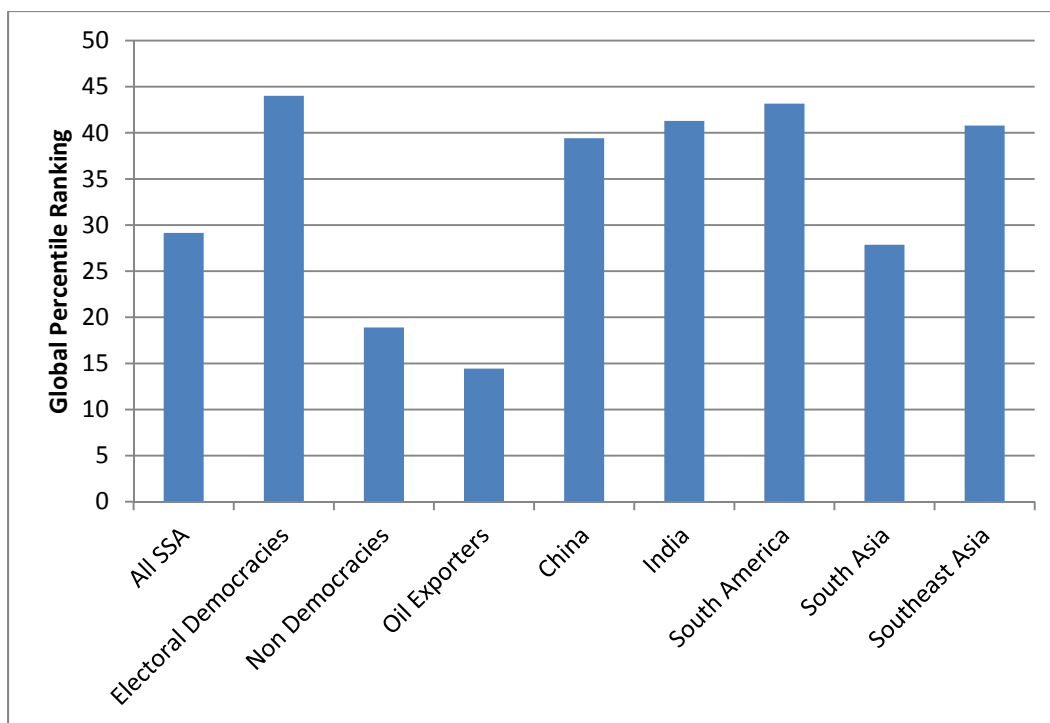
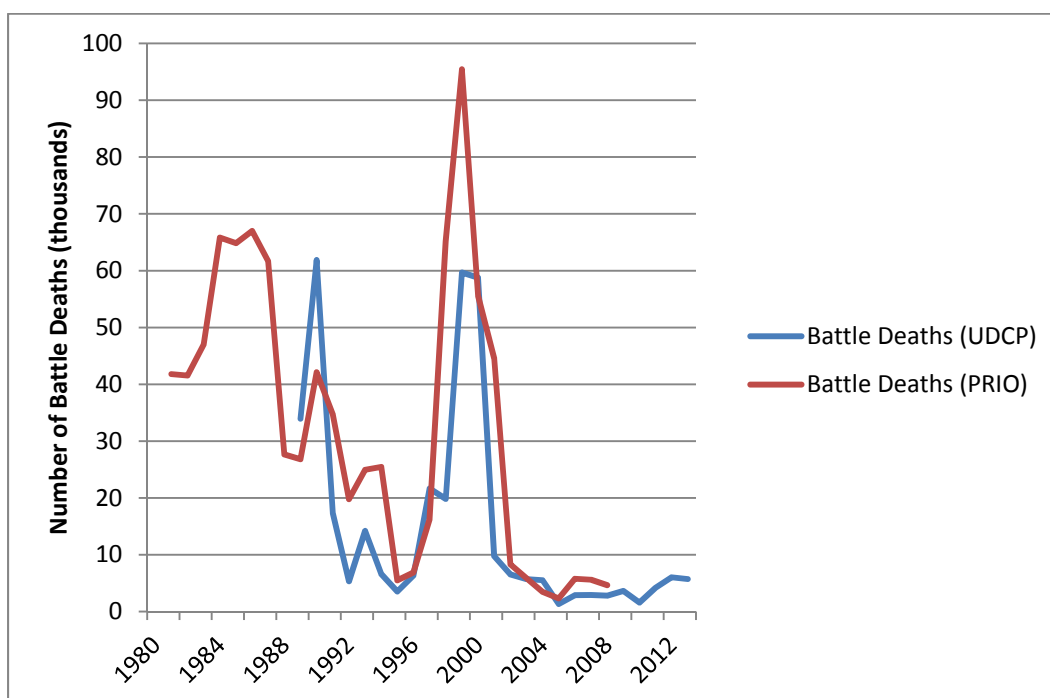


Figure 6. Global Governance Rankings. Global Percentile Rank, World Bank Governance Indicators.



Source: UCDP/PRIO Data Set (Uppsala Conflict Data Program (UCDP), Peace Research Institute Oslo (PRIO))

Figure 7. Total Number of Battle Deaths

1) Fall in Commodity Prices and the Slowdown in Global Economy

Commodity prices began to rise in 2002. This rise in prices helped oil exporting countries and countries that relied on the export of one commodity. Two years ago, prices started to fall, creating some real issues for some countries in Africa, many of which were closely engaged with China.

China's slowdown is permanent. Their economy now has a very different structure and it will not go back to 8–10 percent annual growth. In the next 10 years, India may become the largest emerging market. These changes are affecting countries quite differently. Oil-exporting countries in Africa are in trouble both because prices are down and because they as a group tend to have poor governance. The outlook for these countries is not very bright. By contrast, oil-importing countries are benefiting from the drop in prices. Their outlooks are much brighter. It is even better for those countries that do not rely on just one commodity. For example, Côte d'Ivoire is helped by the fall in oil import prices and a rise in the export prices of cocoa.

2) Climate Change

This is the single biggest threat to the continuation of progress. Climate change often hits hardest the countries that are most vulnerable. Water shortages and droughts are increasingly widespread and damaging. Slowing climate change and mitigating its impacts are urgent priorities for the continent. Darfur is a case in point—the core of the conflict there is a fight over water.

3) Demographic Change

The principal demographic changes are the youth bulge and urbanization. These are both risks and opportunities. Population growth creates not only more mouths to feed, but also more brains to solve problems. Population growth will bring more skills and capacity with it. So far the brains have beaten the mouths. This is an opportunity—the demographic dividend was a gift to Asia; it was the engine that provided economic growth.

The future is relatively bright for the democracies in Africa if the effects of climate change can be mitigated. Much will depend on the big choices that these countries have to make. Experience in economic development globally tells us that one of the keys is to diversify into manufacturing and industry. This will not be easy for Africa. It will take hard policy decisions, cultural changes, deepening democracy, and more leadership accountability. Countries look to the United States for leadership on democracy, and at the moment the United States is not a shining beacon. African countries may look at the United States and decide that the American system of governance does not work very well.

The United States also needs to lead on climate change by investing in technology and working in true partnership with African countries. The United States should not seek

to dictate policies that African countries should follow. Enhancing current institutions is wiser than always trying to build new ones. There is reason to be fairly optimistic that 20 years from now there will be more African countries with significant middle classes.

b. Mr. Judd Devermont

Power dynamics that are going to change in next decade are diffusion of power, passage of power, and expansion of power.

1) Diffusion of Power

This is about the transfer of power from ruler to ruled. The public is going to have a greater say and a more active role in politics. This is sometimes called the *third wave of protest*.¹ The wave metaphor in this set of protests is a little misleading, as waves tend to crest and crash. These protests today are more sustainable and more likely to become part of the permanent political landscape. The public today faces lower barriers to collective action than in the past.

This diffusion of power can be attributed to four structural factors:

1. Increased living standards—Africans are wealthier and healthier than they were a decade ago. This means that they are more able to skip work and tolerate some financial hardship if they protest. Additionally, they tend to be more engaged politically because they have a greater stake in the country's political and economic progress.
2. Urbanization—Africa is about 40 percent urban and expected to become more than 50 percent urban by mid-century. Urban dwellers tend to be more aware of government performance. Government misrule is not as distant or abstract, and urban areas are conducive to organizational start-ups.
3. Communications technology advances—Africa has 1 billion subscribers to mobile phones, making it more connected internally and to the world. This means Africans can disseminate information and organize more effectively. Academics note that countries with high mobile penetration are more susceptible to mass mobilization.
4. Demographic changes—While 70 percent of Africa's population is currently under 25, a growing percentage will cross over that age threshold in the coming years. According to academic experts, older age groups usually participate to a greater extent in civic activities. This is important because Afrobarometer

¹ Taken from the book *Africa Uprising: Popular Protest and Political Change*, authored by Adam Branch and Zachary Mampilly.

surveys indicate that younger Africans do not express as much party loyalty as their parents, so it will be interesting to see what happens to political participation when the growing population ages.

Protests in Africa are increasing more than the global norm in both number and degree of success. The question is how governments will respond. Their choices are to adapt, coopt, anticipate, or repress.

2) Passage of Power

A generational change is taking place. This is the first time in three decades that we are seeing one generation pass the baton to another. Leaving aside Robert Mugabe in Zimbabwe, who was born in the 1920s, there are two leadership groups in Africa today: the independence generation born in the 1930s and 1940s and the generation born in the 1950s and 1960s. According to generational theory, a generational cohort's experiences during its formative years—usually between the ages of 17 and 27—shape its world view. The independence generation grew up in a period when a few leaders changed the world around them. The post-independence leaders came of age when coups, civil wars, and failed attempts at democracy were commonplace. As the passage of power between generations continues, we are likely to see a dominant leadership cohort that is much more conscious of the institutional constraints under which it came to power. There also will be a broadening of elites involved in decision-making. Looking beyond the post-independence generation, it is difficult to predict how the generation born in the 1970s and 1980s will govern; currently, only Congolese President Kabila belongs to this cohort. This next generation has had a diversity of positive and negative formative experiences, from the end of Apartheid to the genocide in Rwanda. It is likely that this generation will share some of the attributes of both the independence and post-independence generation.

3) Expansion of Power

Power is shifting from the traditional heavyweights to regional organizations and smaller countries. In the past, Africa's political and economic trajectories have been disproportionately directed by a few larger countries, mainly Ethiopia, Kenya, Nigeria, and South Africa, as well as key peacekeeping contributors such as Ghana and Senegal. A number of these countries, however, are currently focused on internal problems. This has provided space for other countries to assume greater prominence. From deploying troops to spearheading diplomatic missions, a wider constellation of African governments is taking leadership roles in addressing the continent's problems. There have also been real advances made by the African Union and some of the RECs.

In conclusion, power will not be concentrated in the hands of a few leaders of a particular age from a few countries. Rather, power will be shared and contested by the

public, a rising generation of leaders, and a broader set of countries and regional organizations.

c. Mr. Howard French

The great myth is that Africa is a commodities story. Steve Radelet did a good job in subverting that idea, which is one of the tenacious storylines in Africa. In fact, urbanization is the most interesting demographic change. It is a huge part of the untold story of economic growth in Africa. It is something that not enough attention is paid to. The United States can play a bigger role in helping African countries think through better ways to capitalize on the economic potential from urbanization.

African megalopolises—extended urbanized regions that spill over international borders—are emerging. Lagos has been a terrific growth story and is spilling out westward to reach Benin, Togo, and now even Ghana. The dynamism that they provide to economies is often under-recognized. Infrastructure between countries is being built up, including highway systems, as uninterrupted, high-density urban corridors develop. Urbanization stories such as this are superseding the nation state. They need to be more thoroughly studied.

African demography is largely a good news story. Change tends to happen in places of high population density, and that is beginning to occur in Africa. The negative side of demographic growth coincides with the climate story. Some of the countries with the highest fertility rates are Sahelian countries. They are the most exposed to climate change. Demographics and climate change are combining in an unprecedented way in this part of the world. We are heading toward a collision point at which the Sahel will not be able to support its burgeoning populations. We will face increased extremism and the breakdown of traditional governance.

Finally, a couple of questions for the audience:

- How will Africans be educated in future urban environments? This is one of the greatest questions of our time and a huge opportunity for the United States. Doing something transformative about African education would be the single greatest catalyst in addressing the other problems we have discussed.
- The arrival of China on the scene in Africa is a good thing. Having partnership choices is a benefit for African countries. China, however, also poses some problems for Africa. It dominates a number of the industrial sectors that we think of as entry rungs in the process of industrialization. How can African countries succeed in the process of industrialization given the role of China? If Africa cannot industrialize, the current boom in services will not be sustained.

d. Dr. Amadou Sy

It may be useful to take a different perspective and look at the future from the point of view of African policymakers. Going forward, the diversity in experiences that we see in Africa is going to continue. The key question is whether policymakers will be able to implement the right policies. A common misconception is that Africa's growth has been driven by the commodity cycle. Recent work shows that external factors such as commodity prices explain only half of Africa's growth. The other half depends on domestic policies.

African policymakers are facing short-term economic shocks caused by falling commodity prices. In dealing with these shocks, it is important to look at what the engines of Africa's economic growth have been. Africa has not had the "green revolution" that occurred in other developing countries. As a consequence, agricultural labor has not been freed up to move into the industrial sector. In fact, Africa has seen deindustrialization in recent decades. That means growth has only occurred in the services and natural resources sectors.

The natural resources sector is a boom-and-bust business. It is crucial to manage well the revenues from natural resources. Chile, through its copper fund, has effectively addressed this issue. Zambia is an example of a country that has failed to do so. As Africa countries discover more natural resources, they will need to improve governance in that sector and use revenues more wisely.

Services are the main engine of growth in Africa. Tourism is a growing economic boon. However, the services sector in Africa has not yet been transformed through the application of new technologies and better policies. If the sector is going to attract needed foreign investment, that sort of transformation needs to occur.

In the economy of the future, being part of the global value chains will be crucial. Today, Africa is excluded from global value chains. Regional value chains are beginning to emerge within Africa. Kenya is emerging as a significant investor in other East African economies, and that is fostering growth of sectoral value chains in that subregion.

In conclusion, it is important to be clear on how African countries have financed the economic development that has taken place. It is a misconception that foreign assistance has financed development. In fact, only 1 percent of aid goes to helping African countries develop their own revenue streams. Africa is where it is now thanks to the effort of Africans. African governments are increasingly financing their budgets through tax revenues. Foreign assistance is important, but principally for fragile countries and in areas such as infrastructure development.

2. General Discussion

In response to a participant who, on the basis of the ability of African farmers to adapt to changing conditions, questioned whether climate change is a real danger, Steven Radelet noted that African agriculture has only recently begun to emerge from a centuries-long record of poor performance. Traditionally, African farmers have not been able to adapt well to change. Today, climate change is making an already fragile agricultural situation worse. This does not mean that current dangerous trends cannot be overcome, but investments in technologies, infrastructure, and integration of markets will be needed. It is dangerous that not much is happening in these areas.

Howard French noted the misconception that Africa has plenty of arable land. There is a figure circulating that Africa has 60 percent of the world's unused farmland. The problem is that productive land is not evenly distributed. There are large swaths of Africa in which climate change is going to have a devastating effect on agriculture. Productivity of the land will decrease while populations increase.

The next question concerned the question of education for the 70 percent of African primary school students who do not go on to secondary schools. Should there be greater investments in vocational education? Howard French responded that African countries need to invest in all areas of education. African higher education needs to be revitalized. Vocational and agricultural education needs to be expanded. Youths will only stay in school if they can see the potential for employment at the other end.

Judd Devermont pointed to the exciting potential of online courses. He asserted that burden sharing in terms of classrooms and materials is part of the solution. We need to figure out how to get the best teachers in front of the maximum number of students.

Amadou Sy advocated a holistic approach in which educational programming would be developed alongside industrial and economic policy. Education ministers should confer with ministers of economics and industry. That currently occurs rarely.

Steven Radelet noted that there was a period of heavy investment in primary education and recommended that now the priority should be on secondary education and beyond. The focus should be on creatively rethinking the entire education system, with a focus on improving quality and expanding access, especially for girls.

Continuing on the theme of education, one participant noted that U.S. universities are eager to engage in Africa, and African states are eager to engage with them. Unfortunately, there is no mechanism in the U.S. Government to facilitate the connections. Howard French agreed that the failure of the U.S. Government to serve as a conduit and catalyst for cooperation between universities in the United States and Africa is a tremendous loss. Part of this is also about getting more Africans on American campuses. African universities are in the midst of great changes. Privatization has expanded, but quality is inconsistent. The

next U.S. Administration should seize this opportunity to utilize America's competitive advantage in university education.

The panel closed with responses by the panelists to the moderator's challenge of providing advice to the next U.S. president and an anonymous African leader.

Amadou Sy advised the next U.S. president to look at African countries as partners and to try to make informed decisions based on African priorities. The next president should not view the African continent simply as a recipient of aid. Africa leaders should adopt a sense of urgency in policy implementation given the rapidly changing landscape.

Steven Radelet's message to the next U.S. president was simple—engage. Treat Africans with respect and as partners and listen to their priorities. Think of new models, moving aggressively to a policy of differentiation among countries. He recommended that African leaders seek economic diversification and foster democracy. Part of diversification is investment in a more productive agricultural sector that would provide a foundation for the development of manufacturing and services.

Howard French advocated learning the art of engagement from the Chinese, who have sustained an annual rhythm of high-level visits. The United States needs to upgrade and institutionalize its engagement with Africa. For African leaders, he advised increased engagement with each other. As the continent faces growing structural burdens, integration is a necessity.

Judd Devermont's advice for African leaders was liberalization, a focus on electricity, and embracement of technology. For the U.S. president, he recommended working to empower those African leaders who reach across borders and also working at the subnational level to engage with city and provincial leaders. The United States should seek to harness Africa's soft power in areas such as music and sports.

C. Panel Discussion on “Africa's Evolving Partnerships”

1. **Moderator:** Dr. Kris Inman, Director, Africa Research Initiative National Intelligence University.
2. **Panelists:** Ambassador (ret.) Ebrahim Rasool (former South African Ambassador to the United States and Distinguished Scholar in Residence, Georgetown University); Ambassador (ret.) David Shinn (George Washington University); Ms. Yun Sun (Stimson Center); and Dr. Paul D. Williams (George Washington University).

1. Presentations

a. Ambassador David Shinn²

China, India, and, until recently, Brazil have become major players in the economies of African countries. They have been joined, although at a much more modest level, by other relative newcomers such as the Gulf States, Turkey, Singapore, Malaysia, Indonesia, and Thailand. Collectively, these relatively new arrivals are challenging Africa's more traditional partners in Europe, North America, Japan, South Korea, and Australia. This pattern is likely to continue and even accelerate over the next decade, although not in a linear fashion. Because of economic and political setbacks in Brazil, for example, we have already seen its leaders step back from their significantly increased outreach to Africa. The refocusing of China's economy from manufacturing to the service and consumer sectors is resulting in fewer commodity imports, which impacts negatively African exporters of natural resources. Turkey, because of its preoccupation with the situation in neighboring Syria and increased opposition from the Kurdish minority, could find itself pulling back from expanding ties with Africa. If the price of oil remains low, the Gulf States may also conclude they have less interest engaging in Africa.

1) Future Trends in Africa

Changing conditions in Africa will determine to some extent where individual African countries turn for support and partnerships over the next 10 years. Sub-Saharan Africa has the fastest growing population in the world and will continue to hold that position over the next decade. Africa is also the fastest urbanizing region in the world, albeit from a low base, and this trend will continue over the next decade. Adherents to Islam in Africa are increasing at a more rapid rate than adherents to Christianity. At the end of 10 years, there may be virtual parity in Africa between Muslims and Christians with important implications for social and political relationships.

The unprecedented GDP growth rate in Africa over the past 10 years, on average about 5 percent annually, has already begun to decline and will probably remain below 5 percent over the next 10 years due to lower commodity prices. There have been significant improvements in African infrastructure, again from a low base. At the same time, debt is increasing in Africa and requires special attention, particularly in those countries that rely heavily on the export of oil and minerals.

Climate change will play a major role in the longer run beyond the next decade. As industrialization increases, along with Africa's reliance on solid fuels and underutilization of its renewable energy resources (50 percent of the world's total), air pollution will

² The complete text of Ambassador Shinn's remarks may be found at Appendix C.

become a growing problem. Increasing deforestation and land degradation will result in reduced agricultural productivity and worsened food security in spite of the fact that Africa has 60 percent of the world's non-forested, potentially agriculturally productive land. The quality and quantity of Africa's freshwater are decreasing as a result of over-exploitation, climate change, and pollution.

For a variety of reasons, there will probably not be any decrease in the number of African IDPs (internally displaced persons), refugees, and migration over the next 10 years, and the situation could worsen.

2) Africa's Trade Partners

Until 2009, the United States was Africa's largest trading partner. Then China took the number one position. China has increased its lead every year since 2009, although the annual percentage increase is beginning to diminish. France pushed the United States into the number three position in 2014, and India dropped the United States into fourth place in 2015. Africa's trade with key European countries was largely flat, a few showing small increases and others small decreases. Africa's trade with Japan and South Korea was also essentially flat. Although starting from a modest base, the countries experiencing the largest percentage trade increases included Malaysia, Thailand, Indonesia, the UAE, and Turkey.

Looking 10 years ahead, European and North American trade with Africa will continue to decline on a percentage basis while that with many Asian countries and a few in the Middle East will rise. Look for India in particular to challenge China for the number one position because of its closeness to Africa, need for African oil, and improved ability to compete with China on exports to Africa. Intra-African trade will also become more important.

3) Africa's Aid Partners

The European countries collectively are by far the largest aid providers to Africa. In 2013, European Union institutions, the UK, France, and Germany disbursed 28 percent of all aid to Africa, exceeding \$15 billion. The United States was the single largest bilateral source of aid, accounting for 16 percent of the global total or about \$9 billion. The IDA (International Development Association) window of the World Bank accounted for 11 percent and the Global Fund another 5 percent. The United Arab Emirates disbursed a surprising 9 percent of the global total (\$4.8 billion) to Africa. China provides about \$2.5 billion annually, the African Development Bank \$2.3 billion, Japan just over \$2 billion, Canada about \$1.5 billion, Sweden \$1.3 billion, Norway \$1 billion, and the Netherlands and Denmark just under \$1 billion each. Emerging nations other than China and the UAE probably provide well under \$1 billion each annually.

Looking to the future, the Western countries and development banks will account for the overwhelming majority of aid going to Africa, although the annual dollar amount may not rise above current levels plus inflation. Emerging nations such as China and India will slowly increase their aid, but I don't see any significant rise..

4) Africa's Investment Partners

From 2005 through 2014, Western European countries consistently provided well over one-third of annual FDI projects in Africa. North America dropped from 25 percent of projects in 2005 to 15 percent in 2014. Projects funded by other African countries rose from 9 percent in 2005 to 19 percent in 2014. The number of projects from the Asia-Pacific region, including China, varied between 15 percent and 18 percent. Projects from the Middle East averaged about 9 percent, from the rest of Europe between 1 and 4 percent, and from Latin America less than 1 percent.

Looking over the next 10 years, Western European and North American companies will continue to be the most important investors in Africa. China, India, several other emerging Asian nations, and several of the Gulf States, depending on the price of oil, will increase their share of projects and annual FDI flows to Africa. While there is a growing tendency in some African countries to believe most of the FDI opportunities will come from Asia, they would make a huge mistake to ignore traditional investment partners in Europe and North America.

5) Africa's Security Partners

The major non-African countries contributing troops and police to the nine UN peacekeeping operations in Africa are Bangladesh, India, Pakistan, Nepal, and China. On the other hand, the United States pays for 28 percent of the global UN peacekeeping budget, and Japan has been paying 11 percent, and France, Germany, UK, and China about 7 percent each. China announced late last year an increase in its contribution, which will move it by July this year to second place just ahead of Japan. While non-Western countries provide most of the UN peacekeepers in Africa, Western countries pick up most of the cost. In the case of non-UN peacekeeping operations in Africa, the principal providers of troops to maintain African security are African forces themselves and French forces in Mali, Niger, Chad, Senegal, Burkina Faso, Côte d'Ivoire, Gabon, Central African Republic, and Djibouti. The United States, France, and the UK do much of the training of African peacekeeping forces. China, Turkey, and several other nations are getting involved in the training of African troops.

Because of piracy in the Gulf of Aden, a number of Western and emerging countries contributed ships to end the scourge. Although piracy has largely ended, China, Japan, and India are retaining a naval presence in the region. Japan has established a military base in Djibouti, and China is in the process of constructing one. India has countered with a joint

Indian-Seychelles facility in the Seychelles. Even Saudi Arabia has announced its intention to establish a military base in Djibouti.

Between 1949 and 2008, China's PLA Navy made three calls in African ports. Between 2009 and 2015, China's PLA Navy made 39 calls in African ports, 20 of them at Djibouti as part of the anti-piracy effort in the Gulf of Aden. Over the next 10 years, there will continue to be increased foreign naval activity in the western Indian Ocean, especially by China and India. You will also see more calls at African ports by ships from a number of non-African navies.

6) Conclusion

Although emerging Asian nations, especially China and India, are expanding their influence in Africa, Western countries collectively in Europe and North America are still the predominant partners with Africa, and this will be the case 10 years out. Because there are more outside actors in Africa today, Western influence will decrease, however, on a proportional basis. Perhaps most important, African countries, sub-regional African organizations, and the African Union will take greater responsibility for their own economic future and security.

b. Ambassador Ebrahim Rasool

How will Africa enter digital age and bridge the digital gap? For a reliable supply of technology, you need a robust supply of energy. The first things rebels blow up are energy facilities. Therefore, to enter digital age, Africa needs to make peace. Strides have been made in this vein in the past few years, showing enormous progress in a relatively short period of time.

In 2010, the BRIC (Brazil, Russia, India, China) countries invited South Africa to become the "S" ("BRICS"). The BRICs were putting a "deposit down" on Africa; they understood the opportunity of the growing middle class and the massive urbanized population. They saw the opportunity in infrastructure, a market for goods, the potential for food production, investment capital for infrastructure, and the opportunity to distribute goods all over African continent (and draw goods from the continent). The BRICs understood this, but also understood they would need to invest (e.g., the BRIC bank in Johannesburg).

The Gulf States saw opportunities to expand their economies into Africa (e.g., purchase of waterfront and land). They expanded new airlines into Africa; Saudi Arabia increased its investments in food and fruit production in Africa.

Various countries responded in different ways to Africa. Gulf countries looked to African partners to share the risk—rather than taking it all on themselves (largely built on soft issues, like peace and democracy).

It is unfortunate that Africa became attractive to other markets at the same time that the United States and Europe hit market crashes and were constrained. The hopes and expectations of President Obama couldn't be met after the challenges of 2008. African countries needed to diversify their economies, an area in which the United States could have helped.

Then there were problems with the nature of the eventual U.S. response. These included (1) conditionality and (2) scale:

1. **Conditionality**—In a globalized world with instant communication, we know when the United States overlooks concerns where its interests are overriding. Conditionality (e.g., LGBT rights) was prominent in the U.S. approach to Africa; other partners had few to no conditions. This is not a case for condition-free investment, but one for more flexible or transitional conditions (that are not absolute).
2. **Scale**—The U.S. Government has a penchant for boutique investments (e.g., plants that produce 100 megawatts of energy rather than 1 gigawatt). Africa needs to look at its next generation in terms of providing skills and education on a massive scale. The boutique approach in picking the cream of the crop will not work. Africa's young, growing population is increasingly being feared as a curse, rather than as an asset. We need to counter Boko Haram and security threats, but also come up with durable domestic solutions.

c. Ms. Yun Sun³

1) The Downturn in Sino-African Economic Ties

The popular narrative of Chinese successes in Africa currently faces uncertainties. China had the lowest economic growth rate in 2015 since 1990—6.9 percent. This economic slowdown has had a clear impact on its economic relations with Africa. Sino-Africa trade dropped by 18 percent in 2015, but within that, Africa's exports to China decreased about 40 percent while China's exports to Africa increased slightly by 3.5 percent. This trend has had differing impacts on individual African countries and in general affects resource-rich countries more. In recent years, China had consistently run a trade deficit with Africa, but last year it turned to a surplus. In terms of foreign direct investment, the Chinese Ministry of Commerce acknowledged that China's direct investment in Africa stood at \$1.19 billion during that period, falling over 40 percent year-on-year.

Although the value of Sino-African trade has dropped significantly, it does not mean that China has been importing less from Africa in terms of volume. In fact, with the

³ The text of remarks provided by Ms. Yun Sun may be found at Appendix D.

plummeting price of energy resources and commodities, the volume of China's imports in some categories has increased rather than decreased. For example, China's global oil imports in 2015 in fact increased by 9 percent, and its iron ore imports increased by 2 percent in terms of volume, but not in value.

Although total FDI has dropped significantly, major pledges have been made by Beijing to continue financing of projects and development in Africa. At the Forum on China-Africa Cooperation (FOCAC) summit last December, China pledged \$60 billion in financing for economic cooperation with Africa. The commitment does not have a timeframe to it, unlike previous FOCAC pledges, which all had a three-year timeframe. The scale and volume of Chinese FDI might become smaller, but that does not mean that China will cease being a key player in African economy.

2) China's Actions to Address the Downturn

China has crafted ambitious plans to counter the downturn in Sino-Africa economic relations and to "upgrade" economic cooperation. The first priority is on industrial capacity cooperation, based on a simple logic: African countries wish to expedite their industrialization and modernization while China is adjusting its domestic economic structure. This situation creates the perfect opportunity to work with each other. China hopes that its strengths in technologies and capital could be paired with Africa's advantages in natural and labor resources. China could transfer its labor-intensive industries to Africa to boost the industrial capacity of African countries while freeing China from its declining export-oriented, labor-intensive industries.

The second priority is African infrastructure development. According to a report by my Brookings colleague Amadou Sy last year, official investments from China make up about 20 percent of the external finance Africa receives for infrastructure development. China's emphasis on infrastructure development in Africa precedes the discussion of Africa under the Belt and Road framework. As early as 2014, Chinese premier Li Keqiang had announced a high-speed railway network, highway networks, and a regional air transportation network as China's top priorities in Africa's infrastructure development.

The third priority in China's Africa economic cooperation is to foster the role of private Chinese companies. The role of private companies has grown substantially in the past few years. Last year, as much as 53 percent of Sino-Africa trade was done by private firms. Trade by Chinese state-owned enterprises (SOEs) dropped by 29 percent year-on-year, while trade by private companies grew by 10 percent. The high rate of failure of China's overseas FDI also led to more strict approval procedures by the Chinese government, to which the SOEs are subject.

Last but not least, China has intentionally attempted to downplay the role of natural resources in China's future economic relations with Africa. Natural resources are hardly

mentioned in government statements. The scarcity of reference is not in line with the still significant role natural resources play in China's imports from Africa. As of 2015, the majority of African exports to China remain in natural resources.

3) Problems with China's Policy Blueprint

There are of course many problems associated with China's designed economic agendas in Africa, including political instability, sovereign risk, unfamiliar local environments, and labor disputes. However, the most interesting question is the issue of payment terms for Chinese loans given dropping commodity prices and China's sluggish domestic demand. In the past, many of the loan agreements had been backed by Africa's natural resources, exemplified by the famous Angola model. Currently, as noted above, China is trying to downplay the role of natural resources. However, a key question emerges: If the Chinese loans are not backed or repaid with African resources, what will they be backed and paid with?

There is no consensus on the answer even among Chinese analysts. Some seem to be confident that African GDP growth and tax revenue will gradually lead to a healthy cycle of payment for Chinese loans. Nevertheless, many more are skeptical and see that scenario as a long game and overly optimistic. Another answer is that this type of export promotion is required for China to overcome its current difficulties in economic restructuring. Other than carrying the risk and using Chinese funding to stimulate its exports, the government has no other option. If that is the case, the soundness of the Chinese plan in Africa is indeed debatable.

4) Involvement in African Security

Generally speaking, economic development is a higher priority in China's relations with Africa than security. China is involved in African security issues primarily for two reasons: the need to be a responsible stakeholder and security interests associated with Chinese assets, investments, and personnel on the ground. In general, China supports political approaches and negotiated solutions rather than military solutions or economic sanctions.

China's involvements in African security affairs take place through several channels. The first is bilateral military aid, including cash and training. African military officers still make up the largest share of foreign trainees at Chinese military academies. The second is UN peacekeeping. China is the largest contributor of peacekeepers among Permanent Five countries. Last but not least, China has been providing considerable financial support to the AU's peacekeeping missions, including in DRC, Burundi, Somalia, and Sudan. The emphasis on the AU not only helps to strengthen China's relations with key African countries, but also differentiates its approach from those of Western powers.

d. Dr. Paul D. Williams

1) Priorities

Peace and security: The AU is trying to silence the guns on the African continent by 2020. This will not happen entirely, but it is instructive to look at the AU's new "peace and security architecture roadmap" for 2016–2020.

Goals of the roadmap: create a shared understanding of goals/objectives and what they are supposed to achieve. Can we generate a shared understanding? Can we emphasize the need to increase collaboration and coordination? Can the AU communicate more clearly to stakeholders what it has achieved and how it measures progress?

There are five strategic priorities in the roadmap document:

1. Conflict prevention—the effective and timely prevention of armed conflict/political crises.
2. Effective responses to crises and conflicts on the continent—quicker African peace operations deployments, increased readiness, and bureaucratic capacity to deploy and sustain troops, police, and civilian experts.
3. Reconstruction and peace-building—emphasizes timelines and the need to coordinate support to states and communities emerging from war and violence.
4. Delivering effective and timely responses to strategic security issues affecting the continent (e.g., transnational terrorism, organized crime, illicit financial flows, trafficking, piracy, cybercrime, etc.).
5. Coordination of effective partnerships with all stakeholders to make this architecture come together.

2) Partners

Who are the main AU's partners on peace and security issues? Within the African continent key partners include: eight RECs, regional mechanisms for the African Standby Force (in North and East Africa), *ad hoc* multilateral forums and institutions (e.g., the Lake Chad Basin Commission, G5 States in the Sahel, Gulf of Guinea program), and civil society organizations.

Key external partners:

- More than 40 countries.
- Deepest/broadest partnership is with the UN. A 10-year partnership whereby the UN sought to build AU capacity is coming to an end. We need to ask how to continue these efforts. There is a shift from the provision of security capabilities and building capacity to a *strategic* partnership. One of the most important

institutions in that regard is the UN Office to the AU, which was established in 2010 and began functioning in 2011. There are around 80 UN employees based permanently in Addis Ababa.

- The European Union. The EU's African Peace Facility was set up in 2004 and has financed around 2 billion Euros worth of activities. It is a multilateral-to-multilateral relationship that provides a predictable source of funding (3-year funding cycle). It is fundamentally rooted in EU development programs and so has limitations when it comes to the provision of security assistance.
- The United States was the first country to establish a mission to the AU, but it is still rather poorly equipped for supporting multilateral partnerships and could learn from the EU.
- Having only recently provided financial aid to support the African peace and security architecture, China is now facing some challenges, including where to invest those funds.

3) Challenges

- Arriving at consensual positions at the AU. There is typically a great deal of political contestation, both within the AU and between RECs and the AU.
- Capability and capacity gaps remain in AU peace support operations.
- Bureaucratic gaps are still evident at the AU Commission.
- Money/finance. Most funding comes from outside the continent; more indigenous sources of funds are needed.

2. General Discussion

Questioned about the role of Brazil in Africa, Ambassador Shinn commented that Brazil is so preoccupied with internal problems, "they can't even think about Africa at the moment." That situation will likely persist for 4 to 5 years.

A participant asked about big ideas and potential massively scaled projects that could make a difference in Africa. Are there specific ways that the international community can incentivize bolder thinking initiatives? The panelists provided the following comments:

- Ambassador Rasool—Energy is where scale and conditionality have converged (e.g., dam building). The emphasis on renewable energy by the United States leads to boutique solutions to wean off fossil fuels. But if we are going to drive larger scale of industrialization, we need to scale up what is possible, not just what is desirable. Conditionality is okay, with increasing scale. U.S. companies understand this.

- Ambassador Shinn—The scale of the successful effort to deal with HIV/AIDS was an example of what can be accomplished.

The discussion next turned to China, and specifically to the question of Chinese motives and objectives in becoming involved in the domestic political affairs of African countries. Yun Sun commented that China wants African support for its UN agenda and would like to be able to assert that African prosperity demonstrates that Western democracy is not a universal value. China's position is evolving—while China's objective is not necessarily to interfere, it feels obliged to “interfere when others interfere with them.” Ambassador Shinn noted that China wants assured access to resources. The Chinese are facing same the challenges as everyone else in Africa: terrorism, trafficking, etc.

Yun Sun also discussed China's efforts to employ its soft power in Africa. The Chinese are trying to introduce Chinese culture in the continent through, for example, the establishment of many Confucius centers. The Chinese invite many African students and officials to educational training programs in China. How effective these efforts will be remains to be seen. It is very difficult to compete with Western culture in Africa because Africans identify with Western music, sports, and culture.

D. Luncheon Keynote Speaker—Dr. Jeffrey Herbst, President and CEO, The Newseum

1. Summary

A majority of African countries have now celebrated their 50th anniversaries of independence. They are increasingly mature though quite young by world standards. Democracy is proving difficult, though this is to be expected. A critical, definitional aspect of democracy is whether there is the expectation that if the ruling party loses in a free/fair election, it will leave. Some aspects of democracy prove very hard for even Western countries to achieve. The history of democratization in many countries has been one of attempts, failure, further attempts based on learning. It is not always a linear progression to greater freedom, but rather halting progress with fits and starts.

Many African countries remain very poor. By historic standards their attempts at democratization remain unprecedented. The competition for resources is still great. The state is still the ultimate economic prize in countries without significant private sectors. Many countries are still grappling with their very problematic colonial inheritances and issues revolving around nation building.

Freedom in the world rankings can be used to tell the story. Freedom House provides consistent rankings over many years at a granular level. In the immediate post-colonial period, it is notable that nominal democracies were soon overthrown by the military. By 1973, 70 percent of African countries were classified as “not free.” From 1973 to 1990,

there was remarkable stability on the African continent. There was political stagnation in terms of regime type with very little movement in any of the categories.

In 1990 there was a democratic movement across Africa, partly ignited by the fall of the Berlin Wall, the de-legitimization of socialism, and the spread of political liberalization. Some of the regimes that fell were simply financially bankrupt. The people who picked them up installed multi-party elections. These transitions were less democratic revolutions and more capitalization on the collapse of the old regime. New leaders did not seize power, but found it lying in the streets. Finally, there was no intellectual argument against democracy at that time.

In 2000, there was rather abrupt movement toward freedom across the continent, with “peak freedom” being reached in 2006/2008 when only 26 percent of countries on the continent were rated as not free. Most of the countries that moved from the “not free” group transitioned to the “partly free” categories. This indicates that some of the institutions of democracy were not fully matured or institutionalized.

Since peak freedom, there has been stagnation, and in more recent years movement back toward less freedom. In 2016, 41 percent of the countries were back in the “not free” category. Many of the countries in the “free” category have very small populations. Only 12 percent of the population lives in countries described as “free.” As an aside, in Africa, any category Nigeria is in is going to be overweighted because of its massive population.

A complex set of problems that formed over the last 10 years is now in place:

- Given the sharp movement toward freedom/democracy, it was inevitable for the pendulum to swing the other way.
- Leaders got smarter over time and began to understand how to manipulate elections and donors. What is/is not acceptable in the international system? If they were performing well economically, they would get a break. If they were contributing to peacekeeping, they would get a break. The most recent election in Uganda was an example of an incumbent president understanding exactly how far he could go without risking international censure.
- The international community appears to have lost confidence in the promotion of democracy/freedom, though this varies from donor to donor.
- Across the world there has been a movement away from democracy and freedom. For 10 years now Freedom House scores worldwide have shown a deterioration in democratic performance.

Where are we now?

- Multi-party elections have been institutionalized in most countries across the continent. The plurality of global elections happens in Africa. Leaders, however,

have come to understand how to manipulate them in some cases, though not in all.

- Intellectual arguments against democracy are becoming stronger. The Beijing consensus, which seemingly leads to political authoritarianism, is being exported to Africa, although with very limited success. Successful authoritarians in Africa are beginning to have an effect, as in Rwanda. These regimes are proving good for the people and good for the leader. They represent significant counterarguments to the need for democracy. There is an intellectual battle going on, and at the moment the authoritarians with successful development records are beginning to shape the discourse.
- Those who are opposed to authoritarianism and who seek to gain power through elections are disheartened by attitudes of the international community. There is a feeling that they [African democrats] are on their own and no one is going to come to their aid. It appears to them that the only recourse if elections are unfair is violence. Appealing to the international community does not work.

Other aspects of democracy:

- The press in Africa is deteriorating. Only three countries in sub-Saharan Africa have a free press and they are islands. The rising authoritarian regimes are realizing they can subtly censor the press. Social media is exploding across Africa. It is changing too fast to get a firm understanding of what is happening and figuring out the implications for democratization. The information landscape is evolving very quickly. Many used to believe there was no way for governments to apply censorship of modern media. We now know differently, and freedom on the Internet is deteriorating. Software programs allow for the better monitoring of social media. Regimes can also use violence/intimidation against dissidents. Finally, leaders can simply switch off social media.
- The commodity bust is a highly differential experience for the countries in Africa depending on whether they are importers or exporters of oil and raw materials. The super cycle of high commodity prices of the last decade did not seem to do much for democracy. Increased prices gave leaders greater ability to stay in power. The commodity shocks of this decade will destabilize some governments, which may mean more openings for democratization. Good times did not mean greater democracy, and the reverse is not true either.
- There are some caveats to the narrative of urbanization and population increase. Not all urban areas are the same. Many African cities are not dense enough. Population increases are a challenge and opportunity. No one has worked out how the jobs are going to be produced for all the additional people. Africa must pay attention to technological developments that affect prospects for increasing

employment. Advances in artificial intelligence (AI) and robotics will eliminate positions in agriculture and industry that in the past have been associated with the initial levels of industrial development.

2. General Discussion

During the discussion, Dr. Herbst was asked to comment further on how artificial intelligence will affect prospects for employment in Africa and on whether other technologies might help relieve the unemployment problem. Dr. Herbst responded that growth in technology is vast and deep. Any job that involves repetitive, mechanical ability is now at risk due to AI. What is positive is that Africa is set to see significant gains in agricultural productivity due to scientific advances in seeds and pesticides. The question is whether foreign importers will purchase crops grown from genetically modified seeds.

Online learning could create advantages. A great deal can be done if the best teachers in the world would get together and create online curricula. 3D printing could be a huge benefit to countries that rely on very narrow supply chains, poor infrastructure networks, and are geographically challenged.

Dr. Herbst closed the discussion by underlining the importance of the U.S. Government deciding whether it is willing to draw any red lines related to democracy. What would be so unacceptable in terms of political behavior that the United States would be moved to action? Africans need to understand to what extent the United States will be a factor on issues of freedom. Then they will be able to come to their own decisions.

E. Panel Discussion on “Opportunities and Challenges for the U.S. in Africa in the Coming Decade”

1. **Moderator:** Ambassador (ret.) George F. Ward (IDA)
2. **Panelists:** Ms. Jennifer Cooke (Africa Program, CSIS), Ambassador (ret.) Michelle Gavin (The Africa Center), Dr. Raymond Gilpin (Africa Center for Strategic Studies), and Dr. J. Peter Pham (Africa Center, Atlantic Council)

1. Presentations

a. Ms. Jennifer Cooke

The United States has three primary sets of interests in Africa:

1. Direct and pragmatic interests (e.g., protection of U.S. citizens, assets, and the homeland, access and a level playing field for businesses).
2. A values agenda (e.g., democracy, human rights, and humanitarianism).
3. Sphere of influence interests (e.g., trade regimes, nuclear nonproliferation, etc.).

All three sets of interests have been in play over time, but the emphasis has varied depending on the global geopolitical context, U.S. domestic constituencies, and developments in Africa. The “sphere of influence” concerns of the Cold War gave way to a more values-driven approach—humanitarian interventions and democracy promotion—in the Clinton Administration. In the 2000s, U.S. policy moved to a broader mix of interests: the HIV/AIDS crisis, global terror, rising imports of African oil, the growing importance of multilateral forums, and a more active role in Africa by China and others, all of which have helped bring Africa policy into the U.S. foreign policy mainstream.

Today, all three sets of interests overlap. The U.S. global leadership position depends on support for human rights, contributing to economic growth, and showing leadership during times of great challenges (e.g., responding to Ebola and to devastating conflict. And ultimately addressing these issues redounds to U.S. security and commercial interests as well. But there are also great tensions among U.S. interests: some of our best security partners are authoritarian; some of the better economic performers are not democratic. Dealing with this balance of interests is a great challenge for U.S. policy. We need to make the case that ultimately these interests do converge.

Today’s discussions point to three areas where the next administration has an opportunity to lead and where these diverse interests come together.

1) Formulating a Sustainable Security Governance and Development Model for the Sahel

Here, geography is a challenge. Often regions prone to extremism are not economically or politically important to national governments, resulting in a lack of investment and sustained commitment. Structural conditions, the mobilizing power of radical ideologies, and the political-economic context created by criminal and radical networks make this a daunting challenge. Development and governance reform are long-term endeavors, and support from external partners over the long term will be difficult to sustain. In the short term, strengthening the capacity and professionalism of partner militaries is an important component, as are new technologies that can assist in surveillance, and a more collaborative exchange of information between communities and security forces. But all that must be embedded within a much broader vision and strategy for a durable governance, security, and development architecture in the Sahel.

2) Addressing Corruption and Illicit Financial Flows

Africa loses \$60 billion per year to corruption, and there is a significant opportunity cost to that. Anti-corruption efforts are relevant to all three sets of U.S. interests. The financial flows from trafficking in people, wildlife, and arms serve as means and motive for illicit groups and as means and motive for corrupt leaders to stay in power. Assisting African governments in tracking financial flows that fuel criminality, conflict, and terror

should be an important part of the U.S. approach. The United States can play a leadership role in shifting global norms on tax transparency, tax havens, shell companies, and transfer pricing, and do more to ensure that it does not become a haven for ill-gotten gains.

3) Launching a Comprehensive, Strategic Initiative on Education

Building the human infrastructure needed to support democracy a decade hence starts with education. Education is at the nexus of multiple U.S. interests: in building social cohesion, economic opportunity, improving health outcomes, and generating informed and more equitable societies. Access to education is a critical step in addressing the opportunity and income gap. The United States needs a more strategic approach to supporting education.

b. Ambassador (ret.) Michelle Gavin

Real genius is finding the capacity to make things much simpler, rather than complex. However, any administration will be dealing with complexities in Africa.

There are four broad baskets/topics for the next administration to consider:

1) Democracy and Governance—Institution-Building vs. Relationships

There is tension between the U.S. desire to build strong, democratic institutions and the reality of relationships based on personal ties. Managing our interests requires recognizing that the world isn't always as we would wish it to be. There are important states where a great deal hinges upon the will of one individual. This means what we get done depends on our relationship with that individual. How can we build relationships that result in stronger institutions going forward? In dealing with successions to long-serving leaders, how can we avoid being trapped in short-term considerations and instead focus on the longer term?

2) Preparing Ourselves to Manage a Much More Complex Geography in Africa

In Africa, we will be dealing with a growing number of players over the next decade. There has been movement toward regional integration through the AU, but nationalism is not dead. South Africa and Nigeria are increasingly looking inward and are unlikely to exercise the extent of influence they have in the past. It is a complex stew. The U.S. Government is poorly organized at the bureaucratic level to deal with regions such as the Sahel.

3) Balancing Fear with Opportunities

We need to better balance the increasingly resonant politics of fear with the need to think of the complex African landscape as one of opportunities. We risk becoming so security-conscious that we might isolate ourselves and end up being ineffective. We need to think of the implications of all of our policies for the successor generation. We need to do more than support education; we need the engagement and agency of African youth in building the future of the continent.

4) Educating Ourselves about Africa

Most Americans do not learn much about Africa beyond studying the Atlantic slave trade in secondary school. It is not therefore a surprise that many Americans have misconceptions about Africa. It is important to recognize the limits of our own influence. No matter how much we may desire a given outcome, we often are not the most important actor in the mix in terms of outcomes on the continent. Thinking that we are more significant than we are has led in the past to ineffective policies. As a policy community, we need to recognize that our strategy often needs to be long term and nuanced.

c. Dr. Raymond Gilpin

Africa is entering a new era, and it will not necessarily be a peaceful one. Many challenges lie ahead. From an economic and security perspective, the landscape has become more complex. U.S. policy should not be based on simplistic judgments of who is for us and who is against us. We need to understand complexities. For example, to understand northeast Nigeria, one needs to understand the east-west dynamics in the Sahel and the Lake Chad region.

What will the new Africa look like? There will be continued economic growth, but inequality will deepen. The consumer class will expand, but there will be limited wealth accumulation. Private flows of funds (FDI and remittances) will eclipse development assistance. The leverage that foreign assistance furnished in the past will be reduced. Urbanization will provide a fertile ground for the growth of radicalization.

Five recommendations for dealing with the new Africa:

1. We need to go beyond bilateralism and learn to work also through regional communities and civil society organizations. This is not easy to do due to institutional challenges, resources, and capacity problems.
2. We need to go beyond foreign assistance and highlight partnerships led by the private sector. Investment reports show that the United States is the leading investor in Africa.
3. We need to go beyond traditional security assistance. We have had a “train and equip” mentality for too long. “Train and equip” is needed, but not sufficient. In

cases in which the state is complicit in violence against the population, building democratic defense institutions is an urgent requirement.

4. We need to go beyond interests and highlight coordination and alignment with others.
5. We need to go beyond poverty alleviation and focus on strengthening the middle class.

d. Dr. J. Peter Pham

The challenge for the United States in Africa is to move beyond simply recognizing that there is a new set of realities in Africa to actually changing our relationships with the continent. There are five challenges and opportunities for next administration:

1) Encompassing Africa into Our Overall Global Strategy

Africa needs to be integrated into our overall foreign policy vision. In recent years, the United States has had a bilateral dialogue on Africa with China. The same needs to happen in our other bilateral relationships, with India, for example. We need to think about challenges over time in order to avoid short-term or shortsighted policies. For example, one short-term policy was to include China in the Indian Ocean piracy initiative without considering the long-term ramifications, including the development of a long-range expeditionary capacity by the People's Liberation Army Navy and, more recently, the establishment of the first-ever Chinese military base in Djibouti. We fail to look at relationships globally.

2) Capturing Realities of Africa Institutionally

Our bureaucracies do not agree on what constitutes Africa. In some cases, North Africa is included organizationally with the other countries of the continent. In other cases, North Africa is grouped with Near Eastern states. Dealing with Sahelian issues when Morocco, Algeria, and Libya are dealt with separately in the bureaucracy from Mauritania, Mali, and Chad is not efficient. In fact, with the possible exception of Egypt, countries in the Maghreb are more linked social and economically with sub-Saharan Africa than with the Middle East. Morocco, for example, is the largest African investor in Africa after South Africa and the largest African investor in West Africa.

3) Empowering the Private Sector to Engage

Economic growth is going to be led by the private sector and needs to be incentivized. We need to find concrete ways to do this.

4) Breaking our Bilateral Mindset in Engaging

We need to engage the real effective actors in Africa, including RECs and provincial and state-level entities, not just national governments.

5) Humility in Recognizing Limits of Influence

The next administration could use a heavy dose of humility in recognizing the limits of American influence and capability. The United States is resource limited and needs to think creatively about softer instruments of power and influence.

2. General Discussion

In response to a question about possible unanticipated crises in Africa, the panelists answered as follows:

- The unraveling of countries with no transition plan when leaders depart. (Cooke)
- The water crisis in Africa is flying under the radar right now, leading to boundary crises. The management of river systems could result in serious flashpoints. (Gilpin)
- The Nile issues. The [Grand Ethiopian Renaissance] dam will be completed in the next year, and there is still no agreement on how long they have to fill it. Three major regimes are involved, Egypt, Sudan, and Ethiopia. That is a problem waiting to happen. (Pham)

One participant noted that African countries desire increased free trade, yet European countries work against it and the BRICS strategy doesn't support it. This participant argued that the United States should take the lead in this area, noting that the AU is working on its own continental trade agreement and Africans are serious about continental integration and want to include trade. In response, Raymond Gilpin commented that many agreements are trade-diverting, not trade-creating, opportunities. To increase trade, infrastructure needs to be improved. Peter Pham asserted that the renewal of AGOA was a painful process, and we pat ourselves on the back too much for it. Today, Morocco is the only African country that has a bilateral free trade agreement with United States.

Responding to a comment about training African security forces, Raymond Gilpin opined that most African security sector institutions are more relevant to the Second World War than they are to today's conflict. African war colleges are still teaching old styles of warfare. We have an opportunity to engage and think beyond traditional train and equip and focus on issues that really matter, to take a more creative look at what constitutes security in the African continent. To that, Peter Pham added the caveat that although we have the mechanisms and institutions to address security reform, we do not have the same for political reform. It is possible to reform the security sector completely, and still have very corrupt political institutions.

F. Closing Summary and Comments—Ambassador (ret.) Johnnie Carson, Senior Advisor, United States Institute of Peace

Ambassador Carson summed up the proceedings of the symposium by offering 15 educated assumptions about where Africa and the U.S.-Africa relationship will stand one to two decades hence. In doing so, he underscored some points made by symposium speakers throughout the day and challenged others.

1. **Expansion of Democracy.** The next decade will be an enormously challenging time for the expansion of democracy across Africa. Resistance is growing to further democratization, and a number of democratic-leaning states are starting to slide backwards. The desire for democracy remains strong and robust, and Africa will become increasingly divided between states committed to democracy and those that are authoritarian. We should not give up on democracy. It will continue to remain vibrant. We should not and cannot count out the successful democracies on the continent.
2. **Economic Expansion.** Africa's economies have expanded rapidly over the past two decades, but many will struggle to grow even moderately over the next 10 years. Oil- and mineral-exporting countries will be subject to global trends that are likely to be unfavorable. Sustained long-term growth will require African governments to undertake substantially greater reforms than they have in the past. Africa will have to expand its manufacturing base, increase its global and regional trade, expand its electrical grid, and produce more food for its growing population. If it cannot do those things, some of the gains already made will be lost.
3. **Conflict.** The number of major African conflicts has declined significantly and progressively over the last four decades and will decline further over the next 10 years. We will have to continue to deal with legacy conflicts. Those who argue that Africa is more violent today than ever before have either misread history or never read it at all. We tend to forget how many conflicts have actually been resolved. We are all deeply disturbed as we should be by the problem of Boko Haram and what it is doing to the people of the region. But anyone who is a student of Nigerian history knows that during the Biafra civil war the death toll every week was approximately 5,000, which is vastly higher than the level of violence created by Boko Haram. Just because we are in the business of ending conflicts does not mean that we should make today's conflicts seem greater than they really are. Let's not distort history.
4. **Violent Extremism and Terrorism.** We will see terrorism and violent extremism on the continent increase. Somalia, the Sahel, and northern Nigerian

will remain terrorist hotspots. However, there will be upticks in the level of terrorism in places where we have not seen it before.

5. **Population.** Much has been said about Africa's population and demographics. Africa's population growth will not slow down over the next one-two decades. Over the next 30 years the population will rise from 1.1 billion to approximately 2.3 billion. Africa has the youngest and fastest growing population in the world, and that will continue. Eight of the 10 countries with the highest birthrates are in Africa. Nigeria is the sixth largest Muslim country in the world. By 2050 it will replace the United States as the third largest and most populous country in the world behind India and China. There are more children born in Nigeria everyday than in all of Western Europe.
6. **Urbanization.** Africa's population growth will accelerate the continent's rapid urbanization. By 2020, Africa will have no less than 11 megacities with more than 5 million population, 59 urban areas with 1–5 million population, and 75 cities with more than 500,000. This is massive growth. Most African nations have not dealt effectively with rapid urbanization. They are unlikely to do so while facing lean economic times over the next decades. Urbanization will unleash certain positive benefits. But it will also put enormous pressure on governments to construct more infrastructure and provide jobs.
7. **Mobile Technology.** Mobile technology will not be the silver bullet required to generate significant new employment or the enormous economic growth Africa's burgeoning population will require. In some places, mobile technology has had near revolutionary impact. Technology clearly is driving positive change. But the introduction of new technology will in itself not create the large number of new jobs or the high levels of sustained economic growth necessary for Africa's transformation.
8. **Climate Change.** Climate change will have a devastating impact on Africa over the next three decades. The UN studies are absolutely correct. Africa will be more severely impacted than any other continent and the least capable to deal with climate change. Look at a map of Africa and count the number of African capitals that are on the coast and in low-lying areas. Over 20 African capitals are in that situation, and many will be subjected to increased flooding because of rising sea levels. Climate change experts say that by 2020 some 75–250 million people will be directly impacted by changes in weather. Climate change is real and will have an enormous impact, yet it is not being given the priority it deserves.
9. **Wildlife.** Africa's once abundant wildlife will continue to decline, and some species will face near extinction over the next decade. This is largely due to

poaching, but population growth, urbanization, deforestation, and poor land management are all contributing to this problem.

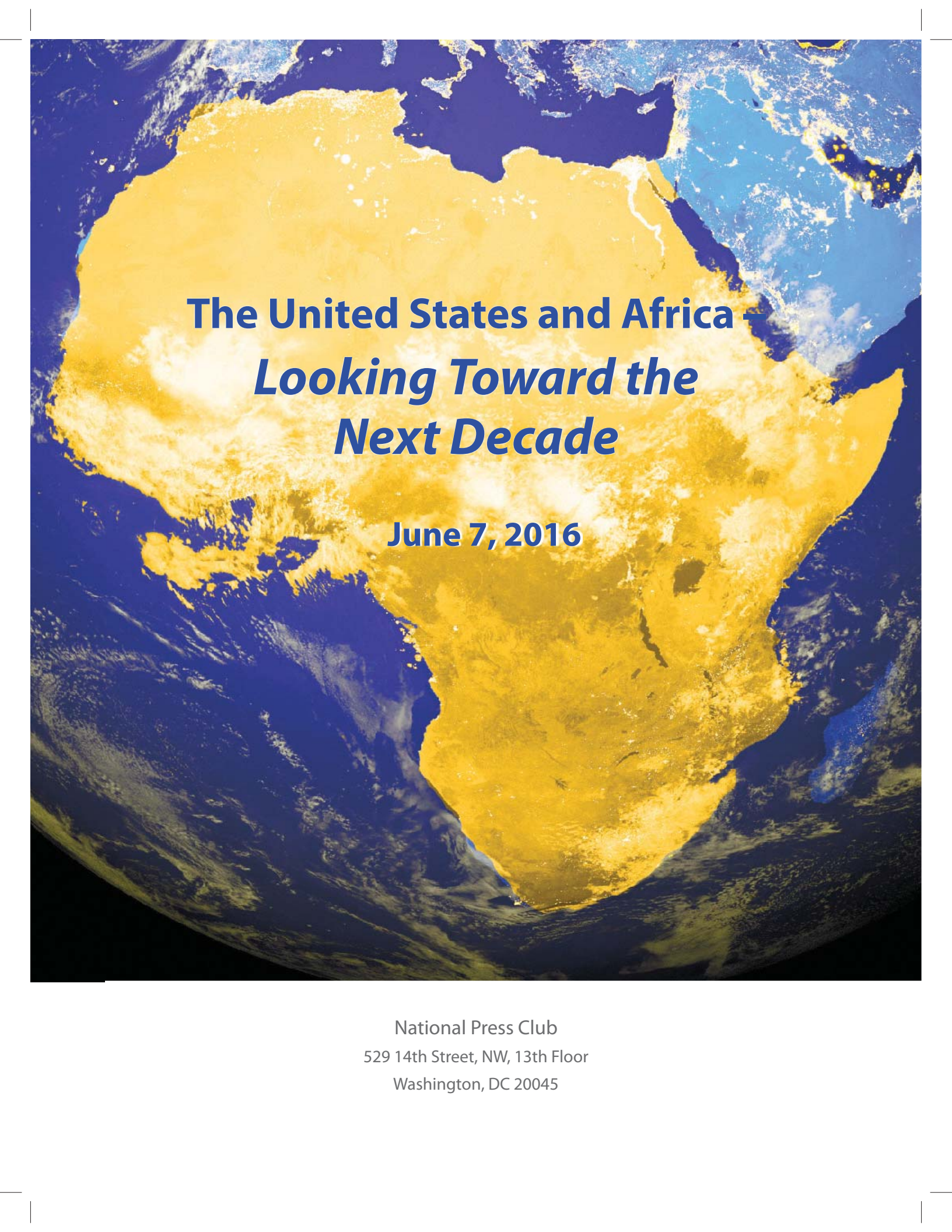
10. **Drugs and Narco-trafficking.** Narco-trafficking and, even more, domestic drug use will present increasing challenges to African governments. Criminal networks will become increasingly strong, not just in West Africa, but also in East and Southern Africa.
11. **Agriculture and Food.** Only toward the end of the day did we hear discussion about agriculture and food. Africa's agricultural production has increased over the last decade, but Africa has not had its green revolution and remains unable to feed itself. It is still spending billions on food imports. African countries are putting greater focus on agricultural production. Nevertheless, it is not likely that Africa will be able to produce enough food to feed its rising population over the next decade given the climate shocks it will face and despite the slow introduction of green farming techniques.
12. **Education.** African education has expanded rapidly over the last 30 years, with near-universal introduction of primary school education around the continent and expansion of both public and private universities. As quantity has grown, quality has not.
13. **Sub-regional Institutions.** Africa is working hard to strengthen its sub-regional institutions. The East African Community has made serious strides toward reconstituting key economic protocols and creating an East African labor market and a common passport system. Progress toward economic integration will remain mixed across Africa and will always be constrained by political tensions and the ambitions of individual leaders.
14. **Nature of Relationships with the United States.** The United States has traditionally built its relationships on a state-to-state basis. This model may be outdated. The United States should find ways to work effectively with cities and provinces, not just central governments. We need to look for new kinds of partnerships that will be beneficial to global communities.
15. **Corruption.** Corruption is one of Africa's most debilitating political and economic cancers. It will remain a problem over the next decade and will only improve as good governance and democracy take stronger root. Building stronger institutions is critical.

In closing, Ambassador Carson stressed that he remained optimistic about Africa's future, but said that progress must be accelerated. A confident Africa can manage its challenges, but the United States also has a role to play. The United States should play its part by focusing on Africa's potential and not always dwelling on its problems. Generating

trade and investment and helping Africans to grow their economies will produce the jobs and opportunities that all desire. Democracy is also important, and building strong institutions that promote good governance, protect human rights, hold leaders accountable, and stop corruption are critical parts of the long-term solution.

Appendix A.

Conference Program

A satellite view of the Earth from space, showing the African continent highlighted in a bright yellow color. The surrounding oceans and other landmasses are in shades of blue and dark blue. The text is centered over the continent.

The United States and Africa – *Looking Toward the Next Decade*

June 7, 2016

National Press Club
529 14th Street, NW, 13th Floor
Washington, DC 20045

AFRICA
SYMPOSIUM

***The United States and Africa —
Looking Toward the Next Decade***

Tuesday, June 7, 2016 – National Press Club

529 14th Street, NW, 13th Floor

Washington, DC 20045

Symposium Program

8:00 AM	Registration and continental breakfast
8:30 AM	Welcome Dr. David Chu , President, Institute for Defense Analyses Dr. David Ellison , President, National Intelligence University Mr. Terrance Ford , National Intelligence Manager/Africa
8:40 AM	Opening Remarks Ambassador Linda Thomas-Greenfield , Assistant Secretary of State for African Affairs
9:10 AM	Panel Discussion – A Continent Evolving: African Megatrends Moderator: Ms. Amanda Dory , Deputy Assistant Secretary of Defense for African Affairs Presenter: Dr. Steven Radelet , Donald McHenry Chair in Global Human Development, Georgetown University Respondents: Mr. Judd Devermont , National Intelligence Officer for Africa Mr. Howard W. French , Associate Professor, Columbia University School of Journalism Dr. Amadou Sy , Director, Africa Growth Initiative, Brookings General Discussion

The United States and Africa – Looking Toward the Next Decade

10:45 AM Break

11:00 AM Panel Discussion – Africa’s Evolving Partnerships

Moderator: **Dr. Kris Inman**, Director, Africa Research Initiative,
National Intelligence University

Panelists: **Ambassador (ret.) Ebrahim Rasool**, former South
African Ambassador to the United States and
Distinguished Scholar in Residence, Georgetown
University

Ambassador (ret.) David Shinn, Professorial Lecturer,
The George Washington University

Ms. Yun Sun, Senior Associate, Stimson Center

Dr. Paul Williams, Associate Professor,
The George Washington University

General Discussion

12:30 PM Luncheon

Keynote Speaker: **Dr. Jeffrey Herbst**, President and CEO,
The Newseum

General Discussion

The United States and Africa – Looking Toward the Next Decade

2:15 PM

Panel Discussion – Opportunities and Challenges for the U.S. in Africa in the Coming Decade

Moderator: **Ambassador (ret.) George F. Ward**, Institute for Defense Analyses

Panelists: **Ms. Jennifer Cooke**, Director, Africa Program, Center for Strategic and International Studies

Ambassador (ret.) Michelle Gavin, Managing Director, The Africa Center

Dr. Raymond Gilpin, Academic Dean, Africa Center for Strategic Studies

Dr. J. Peter Pham, Director, Africa Center, Atlantic Council

General Discussion

4:00 PM

Closing Summary and Comments

Ambassador (ret.) Johnnie Carson, Senior Advisor, United States Institute of Peace

4:30 PM

Symposium Concludes

The United States and Africa – Looking Toward the Next Decade



Map from Central Intelligence Agency's World Factbook.

Biographies

Ambassador (ret) Johnnie Carson

Johnnie Carson was sworn in as Assistant Secretary of State for the Bureau of African Affairs, on May 7, 2009. Prior to this he was the National Intelligence Officer for Africa at the National Intelligence Council, after serving as the senior vice president of the National Defense University in Washington, D.C. (2003-2006).

Amb. Carson's 37-year Foreign Service career includes ambassadorships to Kenya (1999-2003), Zimbabwe (1995-1997), and Uganda (1991-1994); and principal Deputy Assistant Secretary for the Bureau of African Affairs (1997-1999). Earlier in his career he had assignments in Portugal (1982-1986), Botswana (1986-1990), Mozambique (1975-1978), and Nigeria (1969-1971). He has also served as desk officer in the Africa section at State's Bureau of Intelligence and Research (1971-1974); staff officer for the Secretary of State (1978-1979), and staff director for the Africa Subcommittee of the U.S. House of Representatives (1979-1982).

Before joining the Foreign Service, Amb. Carson was a Peace Corps volunteer in Tanzania from 1965-1968. He has a Bachelor of Arts in History and Political Science from Drake University and a Master of Arts in International Relations from the School of Oriental and Africa Studies at the University of London.

Amb. Carson is the recipient of several Superior Honor Awards from the Department of State and a Meritorious Service Award from Secretary of State Madeleine Albright. The Centers for Disease Control presented Amb. Carson its highest award, "Champion of Prevention Award," for his leadership in directing the U.S. Government's HIV/AIDS prevention efforts in Kenya.

Dr. David Chu

David Chu serves as President of the Institute for Defense Analyses (IDA). IDA is a non-profit corporation operating in the public interest. Its three federally funded research and development centers provide objective analyses of national security issues and related national challenges, particularly those requiring extraordinary scientific and technical expertise.

As president, Dr. Chu directs the activities of more than 1,000 scientists and technologists. Together, they conduct and support research requested by federal agencies involved in advancing national security and advising on science and technology issues.

The United States and Africa – Looking Toward the Next Decade

Dr. Chu served in the Department of Defense as Under Secretary of Defense for Personnel and Readiness from 2001-2009, and earlier as Assistant Secretary of Defense and Director for Program Analysis and Evaluation from 1981-1993.

From 1978-1981 he was the Assistant Director of the Congressional Budget Office for National Security and International Affairs.

Dr. Chu served in the U. S. Army from 1968-1970. He was an economist with the RAND Corporation from 1970-1978, director of RAND's Washington Office from 1994-1998, and vice president for its Army Research Division from 1998-2001.

He earned a Bachelor of Arts in economics and mathematics, and his Doctorate in economics, from Yale University.

Dr. Chu is a member of the Defense Science Board and a Fellow of the National Academy of Public Administration. He is a recipient of the Department of Defense Medal for Distinguished Public Service with Gold Palm, the Department of Veterans Affairs Meritorious Service Award, the Department of the Army Distinguished Civilian Service Award, the Department of the Navy Distinguished Public Service Award, and the National Academy of Public Administration's National Public Service Award.

Ms. Jennifer Cooke

Jennifer Cooke is director of the CSIS Africa Program, where she manages a range of projects on political, economic, and security dynamics in Africa, providing research and analysis to U.S. policymakers, members of Congress, and the U.S. military, as well as the broader public. She is a frequent writer and lecturer on U.S.-Africa policy, on political and economic trends across the continent, and on emergent security threats. She recently led the CSIS Nigeria Election Forum, a two-year project examining the major challenges associated with Nigeria's 2015 elections; co-chaired a CSIS project on Africa's new oil and gas producers; and directed a multiyear study on the intersection of religion and politics in Africa.

Ms. Cooke has authored or coauthored numerous CSIS reports, including most recently *Rethinking Engagement in Fragile States* (June 2015); *Africa's New Energy Producers: Making the Most of Emergent Opportunities* (January 2015); *Africa at a Crossroads: Overcoming Obstacles to Sustained Growth and Economic Transformation* (May 2014), and *Launching a New Chapter in U.S.-Africa Relations: Deepening the Business Relationship* (February 2014). With J. Stephen Morrison, she is coeditor of *U.S. Africa Policy beyond the Bush Years* (CSIS, 2009) and *Africa Policy in the*

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Clinton Years (CSIS, 2001). She is a frequent commentator in print, on radio, and on television, and she has testified before Congress on Boko Haram in Nigeria, the political crisis in Côte d'Ivoire, and the African Union.

Prior to CSIS, Ms. Cooke worked at the National Academy of Sciences in the Office of Human Rights and the Office of News and Public Information and in the U.S. Congress on the House Subcommittee on Africa.

Ms. Cooke holds an M.A. in African studies and international economics from the Johns Hopkins University School of Advanced International Studies (SAIS) and a B.A. in government, magna cum laude, from Harvard University. She has lived in Côte d'Ivoire and the Central African Republic.

Mr. Judd Devermont

Judd Devermont is the National Intelligence Officer for Africa. He was previously a senior U.S. government political analyst on Sub-Saharan Africa. From 2011 to 2013, Mr. Devermont served as the National Security Council Director for Somalia, Nigeria, the Sahel, and the African Union. He spent two years abroad working at the U.S. Embassy in Abuja, Nigeria from 2008 to 2010. Mr. Devermont also has lived in South Africa and Côte d'Ivoire. He has a master's degree in African Studies from Yale University and bachelor's degree in history from the University of California, Los Angeles.

Ms. Amanda Dory

Amanda Dory currently serves as the Deputy Assistant Secretary of Defense for African Affairs in the Office of the Secretary of Defense. Previously, she served as the Deputy Assistant Secretary of Defense for Strategy in the Office of the Secretary of Defense from 2008-2011. She is a career member of the Senior Executive Service and has received Presidential Rank Awards in 2010 and 2015.

Ms. Dory has had multiple other assignments within the Department of Defense. She previously served as the Principal Director for Policy and Planning from 2007-2008 and as a Strategist from 1999-2002. Following the publication of the 2006 Quadrennial Defense Review (QDR), she was the Chief of Staff for the Irregular Warfare and the Building Partnership Capacity QDR Execution Roadmaps. From 2003-2006, Ms. Dory served in the newly-established Office of the Assistant Secretary of

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Defense for Homeland Defense as the Director for Planning and Integration. From 1996-1999, she served as the Country Director for Southern Africa and the Country Director for West Africa in the Office of African Affairs. She joined the Office of the Secretary of Defense in 1994 as a Presidential Management Intern.

Ms. Dory's non-governmental experience includes positions with the Carnegie Endowment for International Peace's Nuclear Non-Proliferation Project and Foreign Policy magazine. In 2002, she was selected as a Council on Foreign Relations International Affairs Fellow and conducted an independent research project on civil security based at the Center for Strategic and International Studies.

She received an M.A. in International Affairs from the Johns Hopkins School of Advanced International Studies with concentrations in international economics and African studies. She received a B.S. in Foreign Service from Georgetown University with a certificate in African studies. She is a member of the Council on Foreign Relations.

Rear Admiral David Ellison, Ph.D.

David Ellison became the second President of the National Intelligence University on 30 September 2009.

Prior to retiring from the U.S. Navy in 2004, Admiral Ellison served as the President of the Naval Postgraduate School. During his 34-year career, Admiral Ellison commanded USS Kidd (DDG-993) in Operation Desert Storm and USS Yorktown (CG-48) during Adriatic hostilities. He also commanded the South Atlantic Forces of the Atlantic Fleet and the Western Hemisphere Group, laying the foundation for their evolution to Naval Forces Southern Command/Fourth Fleet. Ashore, he served as an Assistant Professor at the U.S. Naval Academy, a Manpower, Personnel, and Training Analyst on the staff of the Chief of Naval Operations, Senior Military Assistant to the Assistant Secretary of Defense (Force Management and Personnel), and as Executive Assistant to the Vice Chief of Naval Operations.

From 2004-2009, Admiral Ellison was President of the New Mexico Military Institute (NMMI) in Roswell, New Mexico. NMMI annually commissions Second Lieutenants through the Army's Early Commissioning Program and provides over a hundred young men and women to the five federal service academies.

A 1970 graduate of the U.S. Naval Academy, Admiral Ellison earned a Master's

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Degree from The George Washington University and a PhD from The Pennsylvania State University. He completed the Senior Officials in National Security program at Harvard University and was a Senior Fellow on the Chief of Naval Operations Strategic Studies Group at the Naval War College. He has been awarded the Distinguished Service Medal, the Defense Superior Service Medal, the Legion of Merit (four awards), the Bronze Star (Combat "V"), the Meritorious Service Medal (three awards), the Navy Commendation and Achievement Medals, and the Coast Guard Achievement medal.

Mr. Terrance Ford

Terrance Ford was appointed by the Director of National Intelligence in February 2014 to serve as the National Intelligence Manager for Africa, where he leads an interagency team responsible for integrating collection, analysis and policy support for the 49 countries in sub-Sahara Africa. Previously, Mr. Ford served as the Director, DIA's Office of Partner Engagement. From 2008 to 2012, Mr. Ford served as the first J2/Director of Intelligence, U.S. Africa Command. In other civilian assignments, Mr. Ford served as principal deputy to the Deputy Chief of Staff for Intelligence (G2), Department of the Army; and as Vice (and acting) Director for Operations, DIA.

Mr. Ford, a retired U.S. Army officer, served in a variety of command and staff assignments in Germany, including command of the 66th MI Brigade. Other Army assignments included J2, Joint Task Force Provide Promise; Deputy Chief of Staff, Intelligence, U.S. Army Europe & 7th Army; G2 of the 1st Infantry Division during Operations Desert Storm/Desert Shield; Commander, 302nd MI Battalion; Commander, 502nd MI Company and Regimental S-2, 2nd Armored Cavalry Regiment; and as a commander and operations officer, U.S. Army Recruiting Command. Mr. Ford served in Korea with the 501st MI Brigade.

Mr. Ford has been a member of the Defense Intelligence Senior Executive Service (SES) since September 1998. His awards and decorations include three Presidential Rank Awards (two Distinguished and one Meritorious), the Joint Distinguished Civilian Service Award, U.S. Army Award for Exceptional Civilian Service, the Defense Superior Service Medal, Legion of Merit with two oak leaf clusters, Bronze Star, and several others.

Mr. Ford is from Western Pennsylvania. He earned a BS from The Citadel, a BA from the University of Maryland, and an MA from the University of South Carolina. He is a graduate of the Armor Officer Course, the CI Officer Course, MI Officer Advanced

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Course, US Army Command and General Staff College, British Army Staff College, and the U.S. Army War College. Mr. Ford is married and has three children.

Mr. Howard French

Howard French has recently completed work on a new non-fiction book about the history of Chinese power and the geopolitics of East Asia titled; *Everything Under the Heavens: Empire, Tribute and the Future of Chinese Power*. This title is slated for publication in late 2016.

He is the author of *China's Second Continent: How a Million Migrants are Building a New Empire in Africa*, which was published by Knopf in May 2014. *China's Second Continent* was named one of 100 Notable Books of 2014 by The New York Times, and was cited by The Economist, The Guardian and Foreign Affairs and several other publications as one of the best books of 2014.

He is also the author of *A Continent for the Taking: The Tragedy and Hope of Africa* (Alfred A. Knopf, 2004), which was named non-fiction book of the year by several newspapers.

His book of documentary photograph, *Disappearing Shanghai: Photographs and Poems of an Intimate Way of Life*, was published in 2012 by Homa and Sekey. It was produced in collaboration with the Chinese poet and novelist, Qiu Xiaolong.

From 2005 to 2008 alongside his correspondence for The Times, Mr. French was a weekly columnist on global affairs for the International Herald Tribune.

He joined The New York Times in 1986, and worked as a metropolitan reporter with the newspaper for three years, and then from 1990 to 2008 reported overseas for The Times as bureau chief for Central America and the Caribbean, West and Central Africa, Japan and the Koreas, and China, based in Shanghai. During this time, his coverage was twice nominated for the Pulitzer Prize; he was twice the recipient of an Overseas Press Club Award, and his work received numerous other awards.

He received his B.A. in political science from the University of Massachusetts – Amherst. He worked as a French-English translator in Abidjan, Ivory Coast in the early 1980s, and taught English literature for several years at the University of Abidjan. His career in journalism began as a freelance reporter for The Washington Post and other publications in West Africa. Mr. French was a 2011-2012 fellow of the Open Society Foundations.

Ambassador (ret) Michelle Gavin

Michelle Gavin is the Managing Director of The Africa Center, a nonprofit, multidisciplinary institution in New York City dedicated to increasing understanding of contemporary Africa. Previously, she served as the United States Ambassador to Botswana from 2011 to 2014. From 2009 to 2011, Amb. Gavin served as Special Assistant to President Obama and the Senior Director for Africa on the National Security Council.

Amb. Gavin worked with the Council on Foreign Relations as an International Affairs Fellow and an Adjunct Fellow for Africa. Earlier in her career she spent many years working in the United States Senate, including as the Staff Director for the Senate Foreign Relations Committee's Subcommittee on African Affairs.

Amb. Gavin received an M.Phil. in International Relations from Oxford University, where she was a Rhodes Scholar, and earned her bachelor's degree from Georgetown University's School of Foreign Service, where she was a Truman Scholar. She serves on the Board of Directors of Points of Light, and is a member of the Harvard AIDS Initiative's International Advisory Board.

Dr. Raymond Gilpin

Raymond Gilpin is the Dean at the Africa Center for Strategic Studies in Washington, D.C. Under his academic leadership, the Center designs and implements programs that build the capacity of security sector leaders to create conditions and strengthen institutions that foster lasting stability for all.

Prior to joining the Africa Center he served as director of the Center for Sustainable Economies at the United States Institute of Peace from 2007 to 2013, during which time he pioneered work on the economics-conflict nexus in Africa, chaired the Institute's taskforce on business and peace, and managed the web-based International Network for Economics. He has also served as a senior economist at the African Development Bank Group; research director at the Central Bank of Sierra Leone; and economist at the World Bank.

His research interests include the security-development nexus, natural resource management, economic reconstruction in post-conflict regions, and public-private partnerships. Dr. Gilpin is a regular blogger and featured media commentator on

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economic dimensions of peace, US-Africa policy, and energy and security. Recent publications include: “Understanding the Nature and Origins of Violent Conflict in Africa,” in *Minding the Gap: African Conflict Management in a Time of Change*, edited by Pamela Aall and Chester A. Crocker (2016); *Economic Drivers of Mass Atrocities: Implications for Policy and Prevention*, Policy Analysis Brief (2015); “Ebola, Economics and Equality in Africa,” published in *African Arguments*, (2014); “Tackling Energy Infrastructure Vulnerability in Violence-Prone Regions” (2013); and “Trade and Resource Management: A Development Perspective,” in *Nexus Between Security and Development*, edited by Joanna Spear and Paul Williams (2012).

Dr. Gilpin holds a doctorate in development economics from Cambridge University in the United Kingdom and an executive certificate in international finance and capital markets from Georgetown University.

Dr. Jeffrey Herbst

Jeffrey Herbst is president and CEO of the Newseum and the Newseum Institute in Washington, DC. From 2010 to 2015, he was president of Colgate University. He is also a trustee of Freedom House. Previously, he served as provost and executive vice president for academic affairs and professor of political science at Miami University in Ohio. For 18 years he taught at Princeton University, where he also earned his bachelor’s degree summa cum laude in 1983. Dr. Herbst earned a master’s degree from Yale University in 1985 and a doctorate in 1987, also from Yale. He is the author of the award-winning “States and Power in Africa” and, with co-author Greg Mills, “Africa’s Third Liberation” and the just-published “How South Africa Works and Must Do Better.” In addition to many books and articles, he has been published in *Foreign Affairs*, *Foreign Policy*, *The New York Times*, *The Wall Street Journal* and many other papers across the world.

Dr. Kris Inman

Kris Inman is the Chief Africa Researcher at the Africa Research Initiative (ARI), Center for Strategic Intelligence Research, National Intelligence University (NIU). She has nearly 15 years of experience working in and studying sub-Saharan Africa and is an active member of the DC-based Africanist community. Dr. Inman’s scholarly work is on the intersection between democratization, development, and security in Africa. Within this broad theme, she focuses on how the political and economic institutions can be shaped in order to minimize incentives to turn to ideological and political

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extremism. She is the author of several studies and the editor of the ARI bi-annual newsletter (you can see more of her work and the work of the ARI at <http://ni-u.edu/wp/africa-research-initiative/>). Her current book project examines the conditions under which political succession leads to conflict, peace, and economic development in Africa. Since 2015, she has also served as Acting Director of the NIU research fellowship program, which supports advanced research on critical topics for the intelligence community and national security policy makers.

Prior to her work at NIU, Dr. Inman was the lead counter threat finance analyst at the Afghanistan Threat Finance Cell (ATFC) in Kandahar, Afghanistan. She has also served as a counter terrorism analyst at DoD and US Africa Command (AFRICOM). Dr. Inman has a PhD in political science from the University of California, Davis. She is an adjunct faculty member at the University of Southern California, DC Program and Johns Hopkins University, School of Advanced International Studies.

Dr. J. Peter Pham

J. Peter Pham is the Director of the Atlantic Council's Africa Center. Dr. Pham was previously a tenured Associate Professor of Justice Studies, Political Science, and Africana Studies at James Madison University in Harrisonburg, Virginia, where he was Director of the Nelson Institute for International and Public Affairs.

Dr. Pham is the author of more than 300 essays and reviews and the author, editor, or translator of over a dozen books, including, most recently, *Somalia: Fixing Africa's Most Failed State* (Tafelberg, 2013; coauthored with Greg Mills and David Kilcullen). Dr. Pham also contributes to a number of publications including *Foreign Affairs*, *The National Interest*, *Foreign Policy*, *The Hill*, and *The Huffington Post*, and regularly appears as a commentator on U.S. and international broadcast and print media. He is also the incumbent Vice President of the Association for the Study of the Middle East and Africa (ASMEA), an academic organization which represents more than 1,300 scholars of Middle Eastern and African Studies at more than 300 colleges and universities in the United States and overseas, and has served as Editor-in-Chief of ASMEA's peer-reviewed quarterly *Journal of the Middle East and Africa* since 2010.

Dr. Pham served as head of Africa and development issues for the presidential campaign of Senator John McCain in 2008 and co-chair of the Africa policy team for the presidential campaign of former Governor Mitt Romney in 2012. He currently serves as chair of the Africa working group of the John Hay Initiative.

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The Royal United Services Institute (RUSI) for Defence and Security Studies, the Brenthurst Foundation, and the Nelson Mandela Foundation awarded Dr. Pham the 2008 Nelson Mandela International Prize for African Security and Development. In April 2015, the Smithsonian Institution Board of Regents elected Dr. Pham to a three-year term on the Advisory Board of the National Museum of African Art.

Dr. Steven Radelet

Steven Radelet holds the Donald F. McHenry Chair in Global Human Development and is Director of the Global Human Development Program at Georgetown University's Edmund A. Walsh School of Foreign Service. He serves as an economic adviser to President Ellen Johnson Sirleaf of Liberia, and is a Non-Resident Fellow at the Brookings Institution.

Professor Radelet joined the Georgetown faculty in 2012 after serving as Chief Economist of USAID and Senior Adviser for Development for Secretary of State Hillary Clinton. He previously served as Deputy Assistant Secretary of the Treasury (1999-2002). From 2002-2009 he was Senior Fellow at the Center for Global Development. He spent twelve years at Harvard University with the Harvard Institute for International Development (HIID), the Kennedy School of Government, and the Department of Economics. While with HIID, he spent four years as resident adviser to the Ministry of Finance in Jakarta, Indonesia, and two years with the Ministry of Finance and Trade in The Gambia. He and his wife served as Peace Corps Volunteers in Western Samoa.

Dr. Radelet is the author or coauthor of several books and dozens of academic articles, including *The Great Surge: The Ascent of the Developing World* (Simon & Schuster, 2015), *Emerging Africa: How 17 Countries are Leading the Way* (Center for Global Development, 2010) and the textbook *Economics of Development* (W.W. Norton, 7th Edition, 2013). He holds Ph.D. and master's degrees in public policy from Harvard University and a bachelor's degree in mathematics from Central Michigan University.

Ambassador (ret) Ebrahim Rasool

Ebrahim Rasool is a Distinguished Scholar in Residence at Georgetown University's Edmund A. Walsh School for Foreign Service. He works in the Al Waleed bin Talal Center for Muslim-Christian Understanding, advancing an alternative paradigm to

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the inertia of Orthodoxies in the face of Extremisms. He is the founder of the World for All Foundation that endeavors to create a world of coexistence that is safe for difference.

Amb. Rasool has recently completed a term of duty as South Africa's Ambassador to the United States of America, an appointment that was the culmination of a distinguished record of Public Service in South Africa. Previously he served as a Member of Parliament in South Africa's National Assembly, Special Advisor to the State President and has built up extensive experience in various Departments like Health, Welfare, Finance and Economic Development in the capacity of Provincial Minister.

Amb. Rasool has been the recipient of a number of awards: "Social Services Leader of the Year" Award (1995) from the African Investment Group; "Visionary Leadership and Public Good" Award from the World Congress of Muslim Philanthropists (2008); "Commitment and Leadership in the Fight Against Crime" from Business Against Crime (2009); the 2005 London Financial Times "Foreign Direct Investment (Africa) Personality of the Year" Award; the "Nelson Mandela Award for Health and Human Rights" presented to him by the Kaiser Family Foundation in 1998; and "Indonesian Diasporean of 2012" Award by the President of Indonesia. During his term as Ambassador he also received the Award for his Lifetime Commitment to Human Rights by Shared Interest in New York, and Inaugural Presidential Lifetime Achievement Award from the National Press Club in Washington, DC.

Founder of the World for All Foundation, Amb. Rasool is active in rethinking the intellectual tools for co-operative relations between faiths, cultures and communities at a global level, and establishing dignity, inclusion and equity for those marginalized and excluded. The World for All is especially active among Muslim Minority communities, transferring examples of co-existence from South Africa, and increasingly is acting as a conduit for Nelson Mandela's lessons to the Muslim heartlands in need of freedom, democracy and human rights.

Amb. Rasool studied at the University of Cape Town where he received a Bachelor of Arts Degree in English Literature and Economic History, and a Higher Diploma in Education. He has an incomplete Honors in Literary Criticism, started while in prison. In 2014, he was awarded an Honorary Doctorate of Humane Letters, *Honoris Causa*, by the Roosevelt University in Chicago, and the Doctorate of Public Service, *Honoris Causa* from Chatham University in Pittsburgh.

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Ambassador (ret) David Shinn

David Shinn has been teaching in the Elliott School of International Affairs at George Washington University since 2001. He previously served in the U.S. Foreign Service for 37 years with assignments at embassies in Lebanon, Kenya, Tanzania, Mauritania, Cameroon, Sudan, and as ambassador to Burkina Faso and Ethiopia. He served in the State Department as desk officer for Somalia and Djibouti and assistant desk officer for Ethiopia, desk officer for Tanzania and Uganda, State Department Coordinator for Somalia during the international intervention in 1993, and director of East African and Horn of African affairs.

Amb. Shinn serves on a number of non-governmental organization boards and is a frequent contributor to Voice of America, BBC, Al-Jazeera, China Central Television, and Radio France Internationale. He is the author of numerous articles in policy and academic journals and contributor to edited books dealing with Africa. Dr. Shinn is the co-author of *China and Africa: A Century of Engagement* (2012) and *Historical Dictionary of Ethiopia* (2013) and the author of *Hizmet in Africa: The Activities and Significance of the Gülen Movement* (2015).

He has a PhD in political science from George Washington University and blogs at <http://davidshinn.blogspot.com>. He speaks at events around the world concerning African affairs.

Ms. Yun Sun

Yun Sun is a senior associate with the East Asia Program at the Henry L. Stimson Center and a non-resident fellow of the Brookings Institution. Her expertise is in Chinese foreign policy, U.S.-China relations and China's relations with neighboring countries and authoritarian regimes.

From 2011 to early 2014, she was a visiting fellow at the Brookings Institution jointly appointed by the Foreign Policy Program and the Global Development Program where she focused on the Chinese national security decision-making processes and China-Africa relations.

From 2008 to 2011, Yun was the China Analyst for International Crisis Group based in Beijing, specializing on China's foreign policy towards conflict countries and developing world. Prior to ICG, she worked on U.S.-Asia relations in Washington DC for five years.

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Yun earned her master's degree in international policy and practice from George Washington University, an MA in Asia Pacific studies and a BA in international relations from Foreign Affairs College in Beijing.

Dr. Amadou Sy

Amadou Sy is a senior fellow and director of the Africa Growth Initiative at the Brookings Institution and a member of the Editorial Board of the Global Credit Review. He was previously deputy division chief at the International Monetary Fund. He focuses on banking, capital markets, and macroeconomics in Africa and emerging markets.

Dr. Sy has held a variety of positions at the IMF over the last 15 years, covering more than 20 advanced, developing, and emerging countries and all the financial crises since 1998. In addition to his financial sector and country work, he was deputy chief at the IMF Institute where he coordinated, developed and taught macroeconomics and finance courses to mid- and senior level staff from central banks and ministries of finance in Asia and Africa, as well as the IMF. He also worked on a project to set up a Trust Fund for capacity building in Africa.

His policy work won the runner-up 2011 ICFR-Financial Times Prize for best research on financial regulation. He also edited a book on the management of natural resources wealth, which is used in IMF training courses. Dr. Sy has published in academic and practitioner journals, including the Journal of Banking & Finance, the Review of International Economics, the Journal of African Economies, IMF Staff Papers, the African Development Review, the Emerging Markets Review, the International Review of Financial Analysis, and the Journal of Fixed Income. He has presented his work at international conferences and central banks worldwide and has contributed to blogs, podcasts, webcasts, and columns in the financial press.

Dr. Sy holds a Ph.D. in Finance from McGill University where he lectured in finance. He is a CFA Charter Holder and a certified Financial Risk Manager (GARP). ([Twitter](#) @ASYB-rookings)

Ambassador Linda Thomas-Greenfield

Linda Thomas-Greenfield, a member of the career Foreign Service, has served as the Assistant Secretary of State for African Affairs since 2013. In this capacity, she leads the Bureau of African Affairs in developing and managing U.S. policy toward

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sub-Saharan Africa. Prior to this appointment, she served as Director General of the Foreign Service and Director of Human Resources (2012-2013), leading a team of approximately 400 employees who handled the full range of personnel functions for the State Department's 70,000-strong workforce -- from recruitment and hiring, to evaluations, promotions and retirement.

Amb. Thomas-Greenfield's 34-year Foreign Service career includes an ambassadorship to Liberia (2008-2012), and foreign postings in Switzerland (at the U.S. Mission to the United Nations), Pakistan, Kenya, The Gambia, Nigeria, and Jamaica. In addition to the Bureau of Human Resources, her Washington postings include the Bureau of African Affairs (2006-2008) where she served as Principal Deputy Assistant Secretary, and the Bureau of Population, Refugees and Migration (2004-2006) where she served as Deputy Assistant Secretary.

Amb. Thomas-Greenfield was the 2000 recipient of the Warren Christopher Award for Outstanding Achievement in Global Affairs in recognition of her work with refugees. She has received several Superior, Meritorious, and Performance awards, including the Presidential Meritorious Service Award. She was a 2010 inductee into the Louisiana State University Alumni Association Hall of Distinction.

Prior to joining the Department of State, Amb. Thomas-Greenfield taught Political Science at Bucknell University in Pennsylvania. She earned a bachelor's degree from Louisiana State University and a master's degree from the University of Wisconsin, where she also did work towards a doctorate.

Ambassador (ret) George F. Ward, Jr.

George Ward has been at the Institute for Defense Analyses, where he coordinates Africa projects, since 2011. From 2005-2011, he was Senior Vice President for International Programs at World Vision, where he led a group responsible for the design and management of relief and development programs in over 80 countries, including 26 in Africa.

From 1999-2005, he was Vice President and Director of the Professional Training Program at the United States Institute of Peace. There, he created and implemented programs aimed at conflict prevention and management in Africa, the Balkans, Latin America, East Asia and the Pacific, and the Middle East. Amb. Ward was seconded to the Department of Defense in 2003, serving as coordinator for humanitarian assistance in Iraq.

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Amb. Ward was a Foreign Service Officer for thirty years. He was ambassador to Namibia from 1996-1999 and principal deputy assistant secretary of state for international organizations from 1992-1996. As deputy chief of mission in Germany from 1989 to 1992, he played a senior role in the negotiations that led to German unification. During other Foreign Service assignments in Italy, Germany, and Washington, he focused primarily on international security and political-military issues. Before his Foreign Service career, he was an officer in the Marine Corps, serving in the United States and Vietnam.

Amb. Ward received the State Department's Distinguished Honor Award for his contributions to German unification and is the recipient of several other U.S. civilian and military awards. He received a B.A. in history from the University of Rochester, and he earned an M.P.A. from Harvard University.

Dr. Paul Williams

Paul Williams is Associate Professor in the Elliott School of International Affairs at the George Washington University. Dr. Williams is also a Non-Resident Senior Adviser at the International Peace Institute in New York where he co-manages the "Providing for Peacekeeping Project" and a Global Fellow with the Africa Program at the Woodrow Wilson Center.

His research focuses on contemporary peace operations and warfare in Africa. His books include *War and Conflict in Africa* (Polity, revised 2nd edition, 2016); *Enhancing U.S. Support for Peace Operations in Africa* (Council on Foreign Relations Special Report No.73, May 2015); *Counter-Insurgency in Somalia: Lessons Learned from the African Union Mission in Somalia, 2007-2013* (US Joint Special Operations University, August 2014); and *The Oxford Handbook of United Nations Peacekeeping Operations* (Oxford University Press, 2015).

Dr. Williams currently serves on the editorial board to four scholarly journals: *African Affairs*, *International Peacekeeping*, *Global Governance*, and *Global Responsibility to Protect*. He is currently writing a book about the African Union Mission in Somalia (AMISOM).

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Cover photo: Lights in urban areas of Africa, as seen at night. Photo courtesy of NASA.



Appendix B.

List of Participants

List of Participants—7 June 2016

Mr. Andrew Aldrian	Culmen International, LLC
Mr. Todd Anderson	Department of Defense
Ms. Alexis Arieff	Congressional Research Service
Mr. Michael Baca	Department of State
Ms. Jean Bailey	South Africa Sister-State Committee
Mr. Peter Barlerin	Department of State
Mr. Yves Bashonga	Embassy of the Democratic Republic of the Congo
Mr. Jeremy Beck	The Buffalo Group
Mr. John Bennett	
Ms. Lauren Ploch Blanchard	Congressional Research Service
Mr. Alexander Bogart	Defense Threat Reduction Agency
Mr. Jacob Breach	Defense intelligence Agency
Mr. Eric Brooks	National Geospatial Intelligence Agency
Mr. Keirn Brown	RAND
Ms. Meagan Bunch	USAFRICOM
Ms. Kellie Burk	USAID
Dr. Ashley Bybee	Institute for Defense Analyses
Ms. Catherine Byrne	National Security Council
Mr. Tom Calderwood	Defense Threat Reduction Agency
Ms. Kelly Campbell	ODNI
Mr. Anthony Carroll	Manchester Trade
Amb. Johnnie Carson	United States Institute of Peace

Ms. Alexandra Choulenina	Department of State
Dr. David Chu	Institute for Defense Analyses
Ms. Sarah Collins	Institute for Defense Analyses
Ms. Sarah Collman	Council on Foreign Relations
Mr. Nicolas Cook	Congressional Research Service
Ms. Jennifer Cooke	CSIS
Amb. Tiena Coulibaly	Embassy of Mali
Mr. Martin Cox	National Geospatial Intelligence Agency
Ms. Jennifer Dugmore	U.S. Government
Mr. Russell Dallas	Defense Threat Reduction Agency
Ms. Kristen Dennison	Department of State
Ms. Vivian Derryck	The Bridges Institute
Mr. Judd Devermont	ODNI
Ms. Amanda Dory	Department of Defense
Mr. Noah Eden	Department of the Treasury
Mr. Frederick Ehrenreich	Department of State
Dr. David Ellison	National Intelligence University
Ms. Emily Elston	CIA
Dr. Karsten Engelmann	Center for Army Analysis
Ms. Leanne Erdberg	Department of State
Mr. Chad Evans	TRA
Mr. Arthur Evans	USAFRICOM
Ms. Deborah Ewert	Institute for Defense Analyses
Ms. Alison Faupel	U.S. Government
Mr. Steven Feldstein	Department of State
COL Michael Ferguson	US Army (Retired)

Ms. Elisabeth Ferland	Institute for Defense Analyses
Ms. Holly Fletcher	U.S. Government
Mr. Terrance Ford	ODNI
ISCS Timothy Francis	USAFRICOM
Dr. Constance Freeman	Syracuse University
Mr. John Freeman	National Intelligence Council
Mr. Howard French	Columbia University
Mr. Timothy Fyle	National Geospatial Intelligence Agency
Ms. Emily Gabriel	Department of Homeland Security
Amb. Michelle Gavin	The Africa Center
Mr. Colin Geraghty	Office of the Secretary of Defense
Ms. Cheryl Gilbert	National Geospatial Intelligence Agency
Mr. Scott Ticknor	Department of State
Dr. Raymond Gilpin	Africa Center for Strategic Studies
Mr. Michael Goffney	Department of Defense
Mr. Stuart Gold	DIA
MAJ Derrick Goodwin	USAFRICOM
Ms. Tiffany Graham	Department of the Army
Ms. Bernadette Graves	Department of State
Mr. Thomas Greaney	Africa Defense Forum
Ms. Amy Griffith	National Geospatial Intelligence Agency
Mr. Casey Groves	Department of Defense
Mr. Larry Hanauer	RAND Corporation
Mr. Jackson Hau	Department of the Treasury
Ms. Raechel Hazlett	National Intelligence Council
Mr. Perry Helton	Department of State

Ms. Courtney Henderson	Defense Intelligence Agency
Mr. Ross Herbert	USAID
Dr. Jeffrey Herbst	The Newseum
Mr. Christopher Hernandez	USAFRICOM
Mr. Robert Hight	ODNI
Mrs. Jacquella Houey	NIU
Mr. Steven Howell	Department of Defense
Ms. Linda Hunt	Institute for Defense Analyses
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Appendix C.

Text of Remarks by Ambassador David Shinn

Just as the rest of the world has experienced dramatic changes over the past decade, so have the 54 countries in Africa, some obviously more than others. It is a virtual certainty these changes, which have impacted Africa's partnerships, will continue over the next decade. Most of the previous speakers focused on sub-Saharan Africa; my comments refer to the entire continent unless otherwise noted.

China, India, and, until recently, Brazil have become major players in the economies of African countries. They have been joined, although at a much more modest level, by other relative newcomers such as the Gulf States, Turkey, Singapore, Malaysia, Indonesia, and Thailand. Collectively, these relatively new arrivals are challenging Africa's more traditional partners in Europe, North America, Japan, South Korea, and Australia. This pattern is likely to continue and even accelerate over the next decade, although internal developments in each of these countries will determine how significant their partnerships with African countries become.

Because of economic and political setbacks in Brazil, for example, we have already seen its leaders step back from their significantly increased outreach to Africa. The refocusing of China's economy from manufacturing to the service and consumer sectors is resulting in fewer commodity imports, which impacts negatively African exporters of natural resources. Turkey, because of its preoccupation with the situation in neighboring Syria and increased opposition from the Kurdish minority, could find itself pulling back from expanding ties with Africa. If the price of oil remains low, the Gulf States may also conclude they have less interest engaging in Africa. There will also be totally unanticipated developments in countries outside Africa that will impact both positively and negatively their interest in strengthening or relaxing ties with Africa. But while emerging nations will experience positive and negative factors that affect their relationships with Africa, the same situation applies to Africa's traditional partners.

Future Trends in Africa

Equally important are changing conditions in Africa, which will determine to some extent where individual African countries turn for support and partnerships over the next 10 years. Sub-Saharan Africa has the fastest growing population in the world and will continue to hold that position over the next decade. The population growth rate in North Africa is lower. The good news is that Africa will have a younger and more physically

productive population than the rest of the world. The bad news is that Africa may not be able to create enough new jobs to accommodate this rapidly increasing young population, resulting in urban unrest.

Africa is also the fastest urbanizing region in the world, albeit from a low base, and this trend will continue over the next decade. Urbanization will bring more poverty but potentially create attractive hubs for economic and investment activity.

Adherents to Islam in Africa are increasing at a more rapid rate than adherents to Christianity. At the end of 10 years, there may be virtual parity in Africa between Muslims and Christians with important implications for social and political relationships.

The unprecedented GDP growth rate in Africa over the past 10 years, on average about 5 percent annually, has already begun to decline and will probably remain below 5 percent over the next 10 years due to lower commodity prices. On the other hand, there will be more progress on establishing an Africa-wide free trade area, although it will not be complete at the end of 10 years.

There have been significant improvements in African infrastructure, again from a low base, and approved projects guarantee additional gains, especially in power, transportation, and ports. At the same time, debt is increasing in Africa and requires special attention, particularly in those countries that rely heavily on the export of oil and minerals.

While climate change may not have significant impact over the next decade, its effects are being felt, and it will play a major role in the period beyond. Africa will also experience an increase in industrialization as manufacturing in wealthier countries such as China is priced out of the market or shut down for environmental reasons. As a result of these factors, Africa's reliance on solid fuels, and underutilization of its renewable energy resources (50 percent of the world's total), air pollution will become a growing problem and result in more deaths.

Deforestation and land degradation are serious problems in Africa, and the problem will only increase. This will result in reduced agricultural productivity and worsened food security in spite of the fact that Africa has 60 percent of the world's non-forested, potentially agriculturally productive land. The quality and quantity of Africa's freshwater are decreasing as a result of over-exploitation, climate change, and pollution. This will have a negative impact on both the health of African populations and the productivity of its agriculture.

For a variety of reasons, there will probably not be any decrease in the number of African IDPs (internally displaced persons), refugees, and migration over the next 10 years, and the situation could worsen.

While African nations must make their own decisions for dealing with these challenges, the partnerships they develop with countries outside Africa will also determine

their success or failure in coping with or even overcoming these obstacles. The most important relationships will concern trade, aid, investment, and support for countering African security threats such as internal conflict and terrorism.

Africa's Trade Partners

Trade figures, because they are reasonably accurate and comparable across countries, offer some useful insights on Africa's partnerships. Until 2009, the United States was Africa's largest trading partner when China took the number one position. China has increased its lead every year since 2009, although the annual percentage increase is beginning to diminish as countries such as India become more important trade partners. France pushed the United States into the number three position in 2014, and India dropped the United States into fourth place in 2015. Using 2014 trade figures, China held position number one, France number two, the United States number three, India number four, and Spain number five.

More important, however, are recent trends in Africa's trade with the rest of the world. From 2008 through 2014, China and India had huge increases in exports and imports with Africa. The United States had a huge decrease in imports from Africa, mainly due to lower crude oil imports following fracking in the United States, and flat exports to Africa. Africa's trade with key European countries was largely flat, a few showing small increases and others small decreases. Africa's trade with Japan and South Korea was also essentially flat. Although starting from a modest base, the countries experiencing the largest percentage trade increases included Malaysia, Thailand, Indonesia, the UAE, and Turkey.

Looking 10 years ahead, European and North American trade with Africa will continue to decline on a percentage basis while that with many Asian countries and a few in the Middle East will rise. Look for India in particular to challenge China for the number one position because of its closeness to Africa, need for African oil, and improved ability to compete with China on exports to Africa. Countries such as Vietnam, which hardly register as trade partners with Africa today, will become significant players. Intra-African trade will also become more important. In 2014, South Africa was the 10th largest global trading partner with the rest of Africa, and Nigeria was the 16th largest.

Africa's Aid Partners

The European countries collectively are by far the largest aid providers to Africa. In 2013, European Union institutions, the UK, France, and Germany disbursed 28 percent of all aid to Africa, exceeding \$15 billion. The United States was the single largest bilateral source of aid, accounting for 16 percent of the global total or about \$9 billion. The IDA (International Development Association) window of the World Bank accounted for 11 percent and the Global Fund another 5 percent. The United Arab Emirates disbursed a surprising 9 percent of the global total (\$4.8 billion) to Africa.

China provides about \$2.5 billion annually, the African Development Bank \$2.3 billion, Japan just over \$2 billion, Canada about \$1.5 billion, Sweden \$1.3 billion, Norway \$1 billion, and the Netherlands and Denmark just under \$1 billion each. Emerging nations other than China and the UAE probably provide well under \$1 billion each annually.

Looking to the future, the Western countries and development banks will account for the overwhelming majority of aid going to Africa, although the annual dollar amount may not rise above current levels plus inflation. Emerging nations such as China and India will slowly increase their aid, but I don't see any significant rise. UAE aid to Africa in 2013 may have been a one-off event; I doubt it can continue that level of aid in view of the drop in the price of oil. African countries seeking development aid assistance, especially when most of it is in the form of grants, had better continue to look to the West for support over the next 10 years.

Africa's Investment Partners

FDI (foreign direct investment) statistics for African countries are difficult to compare because of different definitions and ways in which the data have been collected. Drawing on a 2015 Ernst and Young report on Africa, one can make the following generalizations. From 2005 through 2014, Western European countries consistently provided well over one-third of annual FDI projects in Africa. North America dropped from 25 percent of projects in 2005 to 15 percent in 2014. Projects funded by other African countries rose from 9 percent in 2005 to 19 percent in 2014. The number of projects from the Asia-Pacific region, including China, varied between 15 percent and 18 percent. Projects from the Middle East averaged about 9 percent, from the rest of Europe between 1 and 4 percent, and from Latin America less than 1 percent.

U.S. companies have traditionally been the most important FDI investors in Africa, adding since 2007 some 700 projects valued at \$53 billion. In 2014, by number of new projects, the UK and South African investors were nipping at the heels of American companies, tied for second place. The next most important countries in order were the UAE, France, Germany, China, India, Portugal, and Spain. The UAE was significant because it was not only fourth in terms of new projects in 2014, but first in terms of dollar amount invested, most of it in North Africa. In 2014, the Gulf States increased their share of African FDI projects to 9 percent. Chinese companies announced 32 FDI projects valued at \$6 billion, although there is a history that some of these announcements never materialize.

Looking over the next 10 years, Western European and North American companies will continue to be the most important investors in Africa. China, India, several other emerging Asian nations, and several of the Gulf States, depending on the price of oil, will increase their share of projects and annual FDI flows to Africa. While there is a growing tendency in some African countries to believe most of the FDI opportunities will come

from Asia, they would make a huge mistake to ignore traditional investment partners in Europe and North America.

Africa's Security Partners

The major non-African countries contributing troops and police to the nine UN peacekeeping operations in Africa are Bangladesh, India, Pakistan, Nepal, and China. On the other hand, the United States pays for 28 percent of the global UN peacekeeping budget, and Japan has been paying 11 percent, and France, Germany, UK, and China about 7 percent each. China announced late last year an increase in its contribution, which will move it by July this year to second place just ahead of Japan. While non-Western countries provide most of the UN peacekeepers in Africa, Western countries pick up most of the cost.

In the case of non-UN peacekeeping operations in Africa, the principal providers of troops to maintain African security are African forces themselves and French forces in Mali, Niger, Chad, Senegal, Burkina Faso, Côte d'Ivoire, Gabon, Central African Republic, and Djibouti. The United States has a major military facility in Djibouti; small drone surveillance operations in Niger, the Seychelles, and Burkina Faso; and small numbers of troops assigned to operations to counter the Lord's Resistance Army in central Africa, al-Shabaab in Somalia, and Boko Haram in northern Cameroon.

The United States, France, and the UK do much of the training of African peacekeeping forces. China, Turkey, and several other nations are getting involved in the training of African troops. China, Russia, France, Ukraine, and the United States are the major suppliers of arms to Africa.

Because of piracy in the Gulf of Aden, a number of Western and emerging countries contributed ships to end the scourge. Although piracy has largely ended, China, Japan, and India are retaining a naval presence in the region. Japan has established a military base in Djibouti, and China is in the process of constructing one. India has countered with a joint Indian-Seychelles facility in the Seychelles. Even Saudi Arabia has announced its intention to establish a military base in Djibouti.

Between 1949 and 2008, China's PLA Navy made three calls in African ports. Between 2009 and 2015, China's PLA Navy made 39 calls in African ports, 20 of them at Djibouti as part of the anti-piracy effort in the Gulf of Aden. Over the next 10 years, there will continue to be increased foreign naval activity in the western Indian Ocean, especially by China and India. You will also see more calls at African ports by ships from a number of non-African navies.

I doubt there will be significant change in support for UN peacekeeping operations except that China may increasingly commit combat troops and slowly increase its numbers. In the case of other security threats to African countries, the heavy lifting will be left to

France, especially in Francophone countries, and the United States in countering terrorist groups. African forces themselves will play a greater role in UN peacekeeping operations, and African Union-sponsored peacekeeping operations may become more common.

Conclusion

Emerging Asian nations, especially China and India, will continue to expand their influence in Africa over the next 10 years in the trade, aid, investment, and security sectors. Depending on the price of oil, the Gulf States may also continue to extend their influence. Turkey and Brazil will make every effort to continue or expand their engagement in Africa unless internal problems force them to draw back. Russia will return to Africa in a significant way if its economy improves and it does not face major new challenges.

But Western countries collectively in Europe and North America are still the predominant partners with Africa, and this will be the case 10 years out. Because there are more outside actors in Africa today, Western influence will decrease, however, on a proportional basis. Perhaps most important, African countries, sub-regional African organizations, and the African Union will take greater responsibility for their own economic future and security.

Appendix D.

Text of Remarks by Ms. Yun Sun

Thank you very much, chairman. It is my great honor to be here today to share my observations on recent developments in Sino-Africa relations. I would like to cover primarily the trends in Sino-Africa economic relations. If there is time, I'll also discuss some of the Chinese perceptions and approaches to the Africa security issues.

The Downturn in Sino-African Economic Ties

First of all, we have heard much about China's economic miracles and success stories in Africa. That story is faced with some uncertainties, or transformation, currently. China had the lowest economic growth rate in 2015 since 1990—6.9 percent. And this economic slowdown has had a clear impact on its economic relations with Africa. Sino-Africa trade dropped by 18 percent in 2015, but within that, Africa's exports to China decreased about 40 percent while China's exports to Africa increased slightly by 3.5 percent. This trend has had different impact on African countries and in general affects resource-rich countries more. If we use Nigeria as an example, bilateral trade between China and Nigeria dropped 16 percent in 2015, but Chinese imports from Nigeria had a more substantial reduction, as high as 53 percent. In recent years, China had consistently run a trade deficit with Africa, but last year it turned to a surplus. In terms of foreign direct investment, the Chinese Ministry of Commerce denied the *Financial Times* report that China's investment in Africa dropped by 84 percent in the first half of 2015. But it did acknowledge that China's direct investment in Africa stood at \$1.19 billion during that period, falling over 40 percent year-on-year. The downturn is attributed to the sluggish global economic recovery, international commodity fluctuations, and the Ebola outbreaks.

How we should interpret the numbers is an important question. One caveat in understanding the trade data is that although the value of Sino-African trade has dropped significantly, it does not mean that China has been importing less from Africa in terms of volume. In fact, with the plummeting price of energy resources and commodities, the sheer volume of China's imports in some categories has increased rather than decreased. For example, China's global oil imports in 2015 in fact increased by 9 percent, and its iron ore imports increased by 2 percent in terms of volume, but not in value. Given China's overall suppressed domestic demand for raw materials due to its economic slowdown, it remains to be seen whether this upward trend in terms of volume is sustainable.

The same issue of interpretation also exists in Chinese development financing in Africa. Although total FDI has dropped significantly, major pledges have been made by Beijing to continue its financing of projects and development in Africa. At the Forum on China-Africa Cooperation (FOCAC) summit last December, China pledged \$60 billion in financing for economic cooperation with Africa. Most of this financing will be consist of loans, concessional loans, and buyers' credits, rather than direct investment. The commitment does not have a timeframe to it, unlike previous FOCAC pledges, which all had a three-year timeframe. Although the Chinese government seems to be working slowly on the actual business plans to disburse the funding, China is unlikely to back out of its commitment. The scale and volume of Chinese FDI might become smaller and they might be less active in traditional extractive sectors, but it does not mean that China will cease being a key player in African economy in the foreseeable future.

China's Actions to Address the Downturn

China has crafted ambitious plans to counter the downturn in Sino-Africa economic relations and to "upgrade" their economic cooperation. The first priority is on industrial capacity cooperation. In China's blueprint, the connection and integration between the development strategies of China and Africa based on industrial capacity cooperation are the key focus. This policy design is based on a simple logic: African countries are at a historical moment to expedite their industrialization and modernization while China is adjusting its domestic economic structure; therefore, the mutual complementarity of their priorities and strategic orientations create the perfect opportunity for them to work with each other. China hopes that its strengths in technologies and capital could be paired with Africa's advantages in natural and labor resources. By combining the comparative advantages of the two, China could transfer its labor intensive industries to Africa to boost the industrial capacity of African countries while freeing China from its declining export-oriented, labor-intensive industries. China believes that with the infrastructure development and human resources training/capacity building, it will be able to assist Africa to achieve its own independent industrial systems and secure a sustainable future.

The second priority is African infrastructure development. According to a report by my Brookings colleague Amadou Sy last year, official investments from China make about 20 percent of the external finance Africa receives for infrastructure development. China's emphasis on infrastructure development in Africa precedes the discussion of Africa under the Belt and Road framework. As early as 2014, Chinese premier Li Keqiang had announced a high-speed railway network, highway networks, and a regional air transportation network as China's top priorities in Africa's infrastructure development. From the Chinese perspective, infrastructure development in Africa is as important for Africa's growth as it is for the Chinese economic restructuring, especially for the absorption of China's overcapacity in infrastructure-related industries.

The third priority in China's Africa economic cooperation is to foster the role of private Chinese companies through less restrictive capital requirements, loosened qualification requirements, and support by government funds to facilitate trade and investment. The role of private companies has grown substantially in the past few years. Last year, as much as 53 percent of Sino-Africa trade was done by private firms. Perhaps because trade by Chinese state-owned enterprises (SOEs) was more related to raw materials last year, the trade by SOEs dropped by 29 percent year-on-year, while trade by private companies grew by 10 percent. Chinese SOEs' investment in Africa also dropped in 2015. This was not only due to China's economic slowdown and a decision to pursue economic restructuring. The high rate of failure of China's overseas FDI also led to more strict approval procedures by the Chinese government, to which the SOEs are subject. According to the vice chair of China's Mining Association, almost 80 percent of Chinese mining companies' overseas mergers and acquisitions have failed.

Last but not least, China has intentionally attempted to downplay the role of natural resources in China's future economic relations with Africa. Natural resources are hardly mentioned at all in government statements or policy papers anymore. The scarcity of reference is not in line with the still significant role natural resources plays in China's imports from Africa. As of 2015, the majority of African exports to China remain in natural resources. According to the statistics by the Chinese customs, crude oil, iron ore, diamonds, agricultural products, and other mineral resources together still accounted for more than 65 percent of Chinese total imports from Africa in 2015. And this number is on the low end because China's demand for raw materials has been suppressed by its economic slowdown.

Problems with China's Policy Blueprint

There are of course many problems associated with China's designed economic agendas in Africa. Traditional problems include political stability, sovereign risk, unfamiliar local environments, labor disputes, etc. However, the most interesting question is the issue of payment terms for Chinese loans given dropping commodity prices and China's sluggish domestic demand. The majority of Chinese financing in Africa is not free grants, but loans and investments. In the past, many of the loan agreements had been backed by Africa's natural resources, exemplified by the famous Angola model. Currently, as noted above, China is trying to downplay the role of natural resources and to evolve toward new models of economic cooperation. However, despite the sound logic, a key question emerges: If the Chinese loans are not backed or repaid with African resources, what will they be backed and paid with? Given the typical long funding cycle of infrastructure investment and the political/economic volatility of African countries, how China will balance the commercial soundness of its lending decisions for infrastructure financing is a key question.

There is no consensus on the answer even among Chinese analysts. Some seem to be confident that the GDP growth and tax revenue to be generated through the infrastructure projects, industrialization, and trade facilitation in Africa will gradually lead to a healthy cycle of payment for Chinese loans. Nevertheless, many more are skeptical and see that scenario as a long game and overly optimistic. Of course, there is another answer. That is that this type of export promotion is required for China to overcome its current difficulties in economic restructuring. Other than carrying the risk and using Chinese funding to stimulate its exports, the government has no other option. If that is the case, the soundness of the Chinese plan in Africa is indeed debatable.

Involvement in African Security

Generally speaking, economic development is a higher priority in China's relations with Africa than security. China is involved in African security issues primarily for two reasons: the need to be a responsible stakeholder and security interests associated with Chinese assets, investments, and personnel on the ground. Related to the Chinese naval facilities in Djibouti, there is also the angle of China's overseas military deployment, but that aspect has not yet matured.

In terms of China's principles in security engagement, Beijing emphasizes the local countries' preferences, insists that UN and regional organizations such as AU play leading roles, and generally supports a political approach to negotiated solutions rather than a military approach or economic sanctions.

China's involvements in African security affairs take place through several channels. The first is bilateral military aid, including cash and training. African military officers still make up the largest share of foreign trainees at Chinese military academies. The content of training ranges from academic education to technical training such as minesweeping. The second is UN peacekeeping. China is the largest contributor of peacekeepers among Permanent Five countries. In 2013 and 2014, China dispatched combat troops to UN peacekeeping missions in Mali and South Sudan. Last but not least, China has been providing considerable financial support to the AU's peacekeeping missions, including in DRC, Burundi, Somalia, and Sudan. Although China has claimed that such an emphasis on the AU is to strengthen Africa's own ability to achieve peace and stability, there are some internal and not-so-altruistic considerations: working through UN on Africa security issues cannot circumvent the traditional Western countries' dominant influence in Africa, and working bilaterally with conflict countries usually raises international suspicion about China's intention and impartiality. The emphasis on the AU not only helps to strengthen China's relations with key African countries, but also differentiates its approach from those of Western powers.

So in brief, besides a few exceptions such as South Sudan, China's role in African peace and security issues has been indirect, through regional organizations, and focused on

financial support and capacity building of AU. China has committed support to the African Standby Force and cooperation on training, intelligence sharing, and joint exercises in support of an African collective security mechanism.

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